



MRS Guidelines for Questionnaire Design

Updated April 2024

Introduction

These Guidelines interpret the MRS Code of Conduct (revised 2023) and provide additional best practice guidance. Unless otherwise stated, Guidelines are not binding.

Research is founded upon the willing co-operation of the public and of business organisations. It relies on the confidence of those involved that it is conducted honestly, objectively, without unwelcome intrusion and without harm to participants. Its purpose is to collect and analyse information and not to create sales or to influence the opinions of anyone participating.

The general public and other interested parties are be entitled to complete assurance that every research project is carried out in accordance with the MRS Code of Conduct and that their rights and privacy are respected.

Rules from the MRS Code of Conduct applicable in each section of this document are stated in bold. These rules are binding on MRS members and MRS Company Partners and breaches may result in disciplinary action. The guidance that follows the rules provides interpretation and additional best practice. Members and Company Partners are reminded that this document is designed to complement the MRS Code of Conduct and should not be consulted in isolation.

As specified in the MRS Code, it is the responsibility of the researcher to keep abreast of any legislation which could affect research with employees and to ensure that all those involved in a project are aware of and agree to abide by the MRS Code of Conduct.

This material is provided for information only. It is not legal advice and should not be relied upon as such. Specific legal advice should be taken in relation to specific issues.

The principles of the MRS Code of Conduct MRS

Members shall:

1. Ensure that their professional activities can be understood in a transparent manner.
2. Be straightforward and honest in all professional and business relationships.
3. Be transparent as to the subject and purpose of data collection.
4. Ensure that their professional activities are not used to unfairly influence views and opinions of participants.
5. Respect the confidentiality of information collected in their professional activities.
6. Respect the rights and well-being of all individuals.
7. Ensure that individuals are not harmed or adversely affected by their professional activities.
8. Balance the needs of individuals, clients, and their professional activities.
9. Exercise independent professional judgement in the design, conduct and reporting of their professional activities.
10. Ensure that their professional activities are conducted by persons with appropriate training, qualifications and experience.
11. Protect the reputation and integrity of the profession.
12. Take responsibility for promoting and reinforcing the principles and rules of the MRS Code of Conduct.

Relevant Definitions from the MRS Code of Conduct (2023)

Client: A client includes any individual, organisation, department or division, including any belonging to the same organisation as an MRS Member, which is responsible for commissioning or applying the results from a project.

Participant: is any individual or organisation from or about whom data is collected. Practitioners: includes all individuals within the data collection supply-chain e.g. researchers, moderators, interviewers, recruiters, mystery shoppers, contractors, freelancers and temporary workers.

Research: is the collection, use, or analysis of information about individuals or organisations intended to establish facts, acquire knowledge or reach conclusions. It uses techniques of the applied social, behavioural and data sciences, statistical principles and theory, to generate insights and support decision-making by providers of goods and services, governments, non-profit organisations and the general public.

Special category data: is the processing reveals racial or ethnic origin, political opinions, religious or philosophical beliefs, or trade union Membership, and the processing of genetic data, biometric data for the purpose of uniquely identifying a natural person, data concerning health or data concerning a natural person's sex life or sexual orientation.

Vulnerable people: Vulnerable people means individuals whose permanent or temporary personal circumstances and/or characteristics mean that they are less able to protect or represent their interests (see MRS Best Practice Guide on Research Participant Vulnerability).

Legal and Regulatory Obligations

The MRS Code of Conduct (2023) contains several requirements covering design, data collection and reporting which are relevant to collecting, using and reporting sex and gender identity data. The following are the key requirements:

Design

The MRS Code (2023) requires practitioners to design research to the specification agreed with clients and to ensure that any data collection is fit for purposes and appropriate for the audience being analysed. When collecting participant data practitioners must not harm or adversely affect participants.

Rule 9 of the MRS Code of Conduct: Members must take all reasonable precautions to ensure that participants are not harmed or adversely affected by their professional activities and ensure that there are measures in place to guard against potential harm.

Rule 11 of the MRS Code of Conduct: Members must take reasonable steps to design projects to the specification and/or quality standards agreed with clients.

Data Collection

The MRS Code (2023) requires participants to be able to express their views, in a way which they prefer and with the option to not respond.

Rule 28 (c) of the MRS Code of Conduct: Members must take reasonable steps to ensure ... c. that participants are able to provide information in a way that reflects the view they want to express, including don't know/prefer not to say.

The Data Protection Act 2018 and the UK GDPR requires a legal basis for processing of personal data. Some personal data is categorised as 'special category data' and is subject to additional requirements when being collected.

Personal data categorised as special category data is data on:

- religious or philosophical beliefs
- health
- racial or ethnic origin
- trade union membership
- political beliefs
- sex life or sexual orientation
- genetic data • biometric data (including photos when used for the purpose of uniquely identifying a natural person) of data subjects

Data collected on gender reassignment may be categorised as special category data if health information is disclosed. Special category data needs to be treated with greater care as collecting and using it is more likely to interfere with individual's fundamental rights or result in discrimination. This is part of the risk-based approach of the UK GDPR. When processing special category data practitioners must have a lawful basis under

Article 6 of the GDPR in addition to meeting a special condition under Article 9 of the GDPR but these grounds do not have to be linked. The MRS GDPR in Brief No.10 - Collection of Ethnic Data and Other Special Category Data provides guidance on what you need to do to meet these requirements and checklists to help to identify what practitioners need to do to collect sensitive special category data in accordance with GDPR. There is no restriction for processing any special category data as long as the requirements of Article 6 and Article 9 are being met, and practitioners fully document what they do when collecting special category data and how they do it.

1: The Interviewer and the Participant – gaining and maintaining cooperation

The Rules

14. Members must disclose the identity of clients where there is a legal obligation to do so.

Comment: Transparency is one of the fundamental principles underpinning data protection laws. In line with this an obligation to name a commissioning client may arise in three main scenarios:

- a) Client is controller or joint controller**
- b) Client is the source of the personal data**
- c) Client is receiving personal data from a research activity**

15. Where files of identifiable individuals are used e.g., client databases, Members must ensure that the sources of the personal data is revealed at an appropriate point in the data collection.

Comment: The identity of the client must be revealed when data collection is undertaken if clients require personal data from a project.

28. Members must take reasonable action when undertaking data collection to ensure all of the following:

- a) that data collection processes are fit for purpose and clients have been advised accordingly;**
- b) that the design and content of data collection processes are appropriate for the audience being analysed;**
- c) that participants are able to provide information in a way that reflects the view they want to express, including don't know/prefer not to say;**
- d) that participants are not led toward a particular point of view;**
- e) that responses and/or data collected are capable of being interpreted in an unambiguous way;**
- f) that any potential use of the personal data is revealed;**
- g) that personal data collected and/or processed is limited to what is relevant; and**
- h) that personal data is stored and transmitted by secure means and only accessible to authorised individuals.**

29. Members must ensure that participants are informed about any recording, monitoring or observation at recruitment and at the beginning of a data collection activity.

Comment: This includes surveillance activities, such as using CCTV and mystery shopping. The latter can only be recorded when undertaking own organisation mystery shopping and staff have been informed of this eventuality.

30. Members must ensure that participants give their permission to take part in a data collection exercise, before proceeding with the activity. Permission requires the following information to be provided to participants:

a) the name of the organisation(s) or individual responsible for data collection;

b) the general subject of the data collection;

c) the purpose of the data collection;

d) the type of data collected, particularly special category and/or criminal convictions data;

e) the right to withdraw at any time

f) whether the data collection is to be recorded and/or observed;

g) who is likely to have access to live or recorded information;

h) the likely length in minutes of the data collection;

i) any costs likely to be incurred by a participant;

j) an assurance that the activity is being conducted in accordance with the MRS Code of Conduct and the relevant data protection legislation which applies in the areas where activities are taking place.

Comment: This applies to all legal basis for processing data, including when data is collected using passive techniques. Permission is defined in Definitions used in the MRS Code of Conduct

34. Members must ensure that a participant's right to withdraw from a project at any stage is respected.

Guidance

1. A good questionnaire should engage the participant from the start. Technically, the quality of data depends entirely on participant engagement and interest in the subject matter. Boredom, irrelevance, and questioning that are outside their frame of reference are likely to lead to poor data.

2. In addition, justice should be done to the knowledge and agenda of the participant. Researchers should consider how the participant would feel not only at the start of the interview, but during it, and when they have finished. How will they react – and will they be willing to help - the next time they are asked to take part in a research project; will they feel it had been an enjoyable experience; will they feel they had the opportunity to have their say about the topic; would they recommend taking part in research to others as a result of their experience?

3. There are occasions on which the research design requires the precise purpose of the research to be disguised. In such cases, the introduction need not explain the precise objectives of the research but must honestly explain the broad subject matter. So, for example, in dealing with a subject such as cinema going, it may be legitimate to communicate the subject matter as being about "leisure activities". It is important however to ensure that the description of the subject matter doesn't mislead participants.

4. The subject of the interview should be described as precisely as possible and be compatible with the objectives of the study. If any sensitive data is to be collected this must be made clear to the participant at the time when co-operation is sought. Researchers should apply their professional judgment in determining what could be sensitive in any given project.

5. In terms of sensitivity, topic areas can be divided into: • those topics that are judged sensitive to everyone, because of the nature of that subject; • those topics that may be sensitive to a group for cultural, religious or political reasons; • those topics that may be sensitive to a particular individual, because of that individual's past history, behaviour and attitudes.

6. In the case of the latter, researchers cannot necessarily take precautions in advance of the interviews, but can treat each case sensitively and individually, giving participants a genuine opportunity to withdraw. Any topic can potentially be sensitive to an individual. Participants who feel their privacy and personal sensitivities are not being recognised or respected may be less forthcoming. Equally, participants who feel they have not been treated with honesty and openness may feel patronised. In both cases, the nature of their responses may be affected. In addition, these participants may feel less willing to participate in further research.

7. All participants must be allowed to exercise their right to withdraw from the interview at any point.

8. Four major issues were identified by research undertaken by the Research Development Fund to impact negatively on both quality of data collected and participants' attitude towards research. These are

- Excessively lengthy questionnaires, or a lack of honesty/transparency about the potential length of the interview
- Repetitive questioning
- Insufficient opportunity for participants to have their say
- Excessive classification section

9. Lengthy interviews can impact on response rates and hence representivity of the sample. Repetitive questions can negatively affect the participant's willingness to be interviewed in the future and hence adversely affect future response rates.

10. Researchers should avoid long or repetitive interviews. This may involve a trade off against the "ideal world" objectives. Consider whether or not a question is required in order to meet the objectives, or whether it is "nice to know".

11. Participants should feel that justice has been done to their knowledge and/or opinions within the confines of the questionnaire or subject matter. This may involve compromise on the part of the researcher.

12. It can be useful to think of the questionnaire as one element in a conversation. It should also be acknowledged that for the majority of participants some subjects

(holidays or cars for example) are likely to be of more interest than others (household appliances or financial services for example). Researchers should take account of this and make particular efforts when dealing with more problematic topics. 1

13. A questionnaire designed for one interview methodology may need to be amended to be effective in another channel. However, researchers should be aware that may also lead to different answers across channels if adequate care is not taken.

Guidance

1. Researchers should ensure that the objectives of a research project are fully translated into a series of questions, which will, as far as possible, obtain the required data.

2. It is the responsibility of all researchers involved in designing a questionnaire to ensure that the questions included are adequate to enable the study to meet its objectives. However where a researcher's advice and recommendation is not accepted, the researcher cannot then be held responsible for any consequent failure to meet the objectives.

3. It is the responsibility of both researchers and clients to ensure that the questions asked meet the objectives of the study:

- The researcher because they have a professional responsibility; and
- The client because their commercial and professional interests are at stake.

4. The interests of research at large are thus served through the encouragement of:

- The credibility of research in the commercial environment
- Participant goodwill through a transparent and effective questionnaire.

5. Good practice dictates that questionnaires should be formally agreed to confirm that all parties are satisfied that the research objectives will be sufficiently met within the practicalities of getting the project done, paying particular attention to:

- Errors of commission (objectives that are badly addressed)
- Errors of omission (objectives that are not addressed either at all or in part).

6. Clients should obtain the guidance of researchers as to the feasibility of meeting defined research objectives:

- Within an interview of a given length
- Within participants' ability to give the information required
- Within ethical and technical best practice

3: Structuring the questionnaire - its impact on interviewers and participants

The Rules

28. Members must take reasonable action when undertaking data collection to ensure all of the following:

a) that data collection processes are fit for purpose and clients have been advised accordingly;

b) that the design and content of data collection processes are appropriate for the audience being analysed;

c) that participants are able to provide information in a way that reflects the view they want to express, including don't know/prefer not to say;

d) that participants are not led toward a particular point of view;

e) that responses and/or data collected are capable of being interpreted in an unambiguous way;

f) that any potential use of the personal data is revealed;

g) that personal data collected and/or processed is limited to what is relevant; and

h) that personal data is stored and transmitted by secure means and only accessible to authorised individuals.

Guidance

1. Whenever possible, a questionnaire should follow some form of natural flow, reflecting a train of thought, a logical conversation, or an implied chronology of events, depending on the subject matter.

2. Good practice is to give high priority to user friendliness in administration, and a structure that is easy to follow for interviewers and participants.

3. Researchers should plan a questionnaire to make it logical from the participant's point of view. This should involve outlining a structure and routing plan before beginning to write questions. The structure need not follow that of the objectives.

4. Consideration should be given to using blocks of sub-group questions and the construction of decision trees or flow charts to assist in structuring (and later routing) a questionnaire.

5. In general, order of questions will have an effect on the answers that are provided. This is generally controllable in an interview setting, or electronically, but when the questionnaire is self-administered, it may not be possible to control the order in which the questions are read and answered.

6. Avoidance of non-sequiturs (i.e. statements having little or no relevance to what preceded them) is recommended. Where they are unavoidable (e.g. in omnibus style questionnaires) appropriate introductory phrases should be used.

7. To prevent a questionnaire being boring use a variety of different forms of questioning to break the routine within the questionnaire.

8. A theoretically optimal research design can result in a repetitive or boring interview. Researchers should, wherever possible, seek ways of engaging and maintaining the participant's interest.

9. Question rotations between interviews, although good practice in themselves, are not a solution to this issue and sometimes have the effect of merely spreading unreliability across several questions, rather than concentrating it amongst a few.

10. The main principle is the rigour, integrity and quality of data. Neither participants nor interviewers should be confused or bored by any questionnaire.

11. Wherever possible, a questionnaire should be piloted before the survey to ensure it can be answered by potential participants as well as meeting the needs of the researcher/client (see Section 6)

12. The guiding rule can be expressed as “doing justice to how people would normally talk about things in everyday language”.

4: Writing the Questionnaire

The Rules

28. Members must take reasonable action when undertaking data collection to ensure all of the following:

a) that data collection processes are fit for purpose and clients have been advised accordingly;

b) that the design and content of data collection processes are appropriate for the audience being analysed;

c) that participants are able to provide information in a way that reflects the view they want to express, including don't know/prefer not to say;

d) that participants are not led toward a particular point of view;

e) that responses and/or data collected are capable of being interpreted in an unambiguous way;

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g) that personal data collected and/or processed is limited to what is relevant; and

h) that personal data is stored and transmitted by secure means and only accessible to authorised individuals.

Guidance

1. In summary, will the participants:

- Understand the questions and /or the answer options?
- Be willing to answer the questions?
- Be able to answer the questions?

2. In practice every researcher knows that there is no right and wrong question or answer, and that, legitimately, different questions get different answers. The prescription for writing questions is therefore intrinsically linked to the interpretation of the results and data that will be obtained.

3. It is possible to frame questions or question sequences to support or dismiss any point of view, with varying degrees of subjectivity built in. This is particularly relevant to published research, and question wording is particularly crucial in opinion and advocacy research. The general public expects 'objectivity' in market research exercises even when this is not always the purpose.

4. Researchers should take particular care to ensure that participants are not led to a particular answer. For example, any underlying facts to be communicated to the participant should be set out in a neutral manner. Positive phrases such as “the proposal

is a good idea" in a question without a balancing negative phrase may lead the participant to a positive view of the proposal under consideration.

5. Sensitive subject areas should be explored through appropriately sensitive or even indirect questions. Sensitive subjects are most often placed towards the end of a questionnaire.

6. Participants should always be given the opportunity to decline to answer any question.

7. Any question that a participant is required to answer should be:

- Within their frame of reference (in business-to-business research for example, can a single informant answer all the different questions?)

- Relevant to them. If this is not achieved, participants will be forced to guess. In interpreting the responses, the researcher may not be aware of this.

8. Question concepts should be clear and understandable with as little ambiguity as possible. In general terms, a question should be interpretable in only one way.

9. Questions should be clear and phrased in language appropriate to the participant's way of thinking/talking.

10. Only one question should be asked at a time - questions containing multiple concepts (e.g. What do you think about the colour and taste of the product?) rarely give sensible data.

11. The status of answers should be understood by researchers. Are we asking questions that can be answered: • Accurately (e.g. What was your age last birthday?) • Through memory (e.g. How many times in the last month have you done X . . .?) • Through a best choice of options, none of which may correspond precisely to the participant's view / behaviour (e.g. Which of these three statements comes closest to describing your view . . .?)

12. Appropriate answer code options should be available that reflect the reality of the range of responses. Response codes should be: • Clear and understandable, with as little ambiguity as possible; • Phrased in language appropriate to the participant's way of thinking/talking.

13. The questionnaire should be designed to indicate that a question was asked, even if it has not been answered. It should always be possible to record a "don't know" response as this is often a perfectly valid answer, and a "not answered" response. The responses are distinct and should not normally be combined at the data collection stage. Classification questions can be seen as intrusive, and should be kept to a minimum.

14. Wherever appropriate space should be provided to allow the recording of comments of participants on the topic(s) not covered by the questionnaire. This achieves two objectives: • It encourages participants to feel researchers are interested in and value their views; • It might prove beneficial to the study in illustrating aspects of the topic(s) not adequately covered in the questionnaire.

15. Consider the appropriateness of question wording to the audience, particularly where it might be difficult to be answered by, or cause offence to, minority groups or people with special needs.

16. Where appropriate standard questions or questions used on previous research should be considered. Use of such questions gives comparability across studies and can enhance the value of the data to the client.

5: Questionnaire Instructions

Guidance

1. The instructions within a questionnaire are crucial to the reliability of the data returned and should be clear and unambiguous. Such instructions help both the interviewer (if used to gather the data) and the participant.
2. Each question in a questionnaire has four key routing instructions (whether overt or implied) associated with it:
 - Who should answer the question? For example: "Ask all" versus "Ask only those using product X at QY".
 - How is the question to be asked? For example: "Read out" versus "Do not read out".
 - How is the answer to be recorded? For example: "One code only" versus "code all answers mentioned".
 - Where will they go next? For example: "Users ask QX" or "Non users skip to QY".
3. The same design principles apply whether the questionnaire is administered on paper, by a computer-assisted method, or online.
 - In CAPI, CATI, online questionnaires or related computer assisted modes much of the routing will be embedded in the computer script and therefore need not be overt to the interviewer or participant.
 - Instructions for self-completion questionnaires should be clear and user friendly.
4. Neither interviewers nor participants should be held responsible for data collection errors arising from poor, or inadequately signposted, routing and/or instructions. Excessive complexity of routing is to be particularly discouraged. Consider including a question twice on the questionnaire in order to avoid complex routing

6: Piloting

Guidance

1. On quantitative surveys, a small number of pilot (test) interviews should ideally be conducted to test the feasibility and appropriateness of the questionnaire. The main principle at stake is the responsibility of the researcher to collect high quality data in an objective manner, but there are also participant issues. It may be necessary to test whether the questionnaire is compatible with the rights of participants, particularly where sensitive issues or subjects are involved.
2. Where a client researcher is present at the pilot, the same rules apply as in other observed research.
3. Researchers should pilot questionnaires, not least to test the questionnaire for length, comprehensibility, and general good sense.
4. Researchers should satisfy themselves as to the workability of a questionnaire through an internal pilot, that is, pilot interviews with colleagues or others not involved in the research.
5. Researchers should conduct pilot interviews with a small selection of the target audience for any given research project.
6. Certain circumstances demand particularly rigorous piloting. For example:
 - When dealing with unfamiliar concepts – observation (watching pilot interviews), or qualitative pilots, can help in framing questions in the right way;

- If there are areas in the questionnaire where there are no ready-made code lists, pilots can help generate initial codes for open ended questions;
- Where it is obvious that the interview is potentially very complex or lengthy;
- Where questions are potentially contentious;
- When it is necessary to review and test alternative question strategies;
- Where a questionnaire will be delivered on a variety of platforms, eg multiple web browsers, multiple operating systems or on mobile devices.

7: Dealing with the Results

The Rules

57. Members must provide clients with sufficient information to enable clients to assess the validity of results of projects carried out on their behalf.

58. Members must ensure that data include sufficient technical information to enable reasonable assessment of the validity of results.

60. Members must ensure that outputs and presentations clearly distinguish between facts, opinion, and interpretation.

61. Members must ensure that findings disseminated by them are clearly and adequately supported by the data.

Guidance

1. Researchers have a responsibility to deal with results in a way that reflects the questions that were asked, rather than (mis)interpreting data in the abstract. This includes paying close retrospective attention to question phrasing, to whether the answers were prompted or unprompted, and so on.

2. Researchers also have a broader responsibility to deal with answers in a way that respects participants' views. This will help retain the confidence of the general public and business community, ensuring future participant co-operation and the health and good image of the research profession. It is impossible to divorce good practice in questionnaire design – in terms of ethical and technical responsibilities – from the interpretation of the resulting data. As part of the questionnaire design process, researchers should consider how they expect to analyse and report the results. This will aid in avoiding errors of both commission and omission.

8: Some references for help in questionnaire writing.

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