



MRS Post-Lockdown Covid-19 Guidance: Undertaking Safe Face-to-Face Mystery Shopping

A Status Update Across the Four Nations &

Guidance for England from 29th March 2021

Introduction

The Covid-19 pandemic continues to evolve and now as England prepares to enter slowly another post-lockdown it is essential that practitioners follow government guidance about social contact and social distancing.

The aim of this document is to provide an update on the current government advice from across the UK's four nations and to provide updated practical guidance for practitioners when undertaking face-to-face mystery shopping with participants in England.

Context

This MRS guidance sets out the conditions for limited resumption of face-to-face data collection activities as England cautiously plans to lift restrictions via the 4-step plan issued by the UK Government on 22nd February.

To enable practitioners to prepare the guidance is being issued prior to when it will apply, which will be from 29th March 2021. Until that date the [MRS lockdown guidance](#), issued on 6th January 2021, will continue to apply.

The fundamental principle underlying this guidance is that face-to-face data collection will only be undertaken when no other alternative methodology can be used. This principle should be followed until the working from home and social contact messaging is reviewed as part of step 4 of the government's roadmap. **The MRS guidance may change before 29th March 2021 if government advice regarding the proposed 4-step plan is modified.**

Northern Ireland, Scotland and Wales have also adopted specific measures. Research practitioners are required to give priority to local guidance i.e. where research practice takes place.

MRS advice is based on our current understanding of Government guidance and support on COVID-19 which is subject to continuous development. MRS will update and publish accordingly, but it remains the responsibility of research practitioners to keep up to date.

It should be noted the MRS guidance does not replace government advice; it is meant to supplement the official sources with the addition of some research considerations. Remember to continue to check the up-to-date guidance on the relevant Government websites:

- [England](#)
- [Northern Ireland](#)
- [Scotland](#)

- [Wales](#)

New Covid-19 Requirements for the UK's Four Nations

England

A roadmap out of lockdown was announced by the UK Government on 22nd February 2021 and are summarised on the UK Government site:

<https://www.gov.uk/coronavirus>.

From **29th March** the Stay-at-Home orders will end and outdoor gatherings are allowed, although many restrictions will remain.

The [MRS lockdown guidance](#) applies to England until 29th March 2021 after which the new guidance (detailed in this document) will apply.

Northern Ireland

The current restrictions are in place until **1st April 2021**. They are due to be reviewed on 18th March 2021. The current restrictions are summarised here:

<https://www.nidirect.gov.uk/sites/default/files/publications/Coronavirus-restrictions-February-2021.pdf>

The [MRS lockdown guidance](#) applies in Northern Ireland until the changes are announced to the current restrictions.

Scotland

A roadmap out of lockdown was announced by the Scottish Government on 23rd February 2021 and are summarised on the Scottish Government site:

<https://www.gov.scot/publications/coronavirus-covid-19-strategic-framework-update-february-2021/pages/overview/>

The Scottish Government has not provided fixed dates for when restrictions will be eased due to continued uncertainties. The Scottish Government hope that current lockdown measures will be eased from 15th March, with stay-at-home restrictions lifted on 5th April and a return to the Scottish Levels system from 26th April.

It is planned that all of Scotland will be returning to Level 3 from 26th April. Some changes to the Scottish Level system are planned. The [MRS face-to-face data collection guidance interpreting Scotland's level system](#) will be updated once more detail is available.

The [MRS lockdown guidance](#) applies in Scotland until the changes are announced to the current restrictions.

Wales

All of Wales continues to be at Alert Level 4. Since 20th February 2021 four people from two households can exercise together outdoors and schools opened for some learners. Details about the Alert levels are available here: <https://gov.wales/alert-level-4>

The [MRS lockdown guidance](#) applies to Wales until changes are made to the Welsh Alert system.

Face-to-Face Mystery Shopping Guidance for England to apply from 29th March 2021

How to read the guidance and links to the MRS Code of Conduct

Scope

The following is MRS current guidance on undertaking face-to-face data collection activities to avoid potential infection to research practitioners, participants and contractors.

The guidance provides mandatory requirements, 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.

The MRS Covid-19 guidance does not take precedence over national law. Members and Company Partners responsible for international projects shall take its provisions as a minimum requirement and fulfil any other responsibilities set down in law or by nationally agreed standards.

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

This guidance is not legal advice and should not be relied upon as such. Specific legal advice should be taken in relation to any specific issues.

Principles of the Guidance

- Research is a business activity, not a social activity.
- Research practitioners have a responsibility to protect participants and the reputation of the profession.
- Face-to-face data collection will only be undertaken when no other alternative methodology can be used.
- Research practitioners must undertake risk assessments of any proposed face-to-face data collection exercise before beginning the activity.
- When face-to-face data collection is undertaken it can only be undertaken in those locations that remain open as a result of Covid-19 restrictions and in locations allowed within the MRS guidance.
- In-home face-to-face data collection continues to be restricted to on the doorstep only.

Interpretation of Requirements

When requirements use the word "must" these are mandatory requirements and is a principle or practice that applies the MRS Code of Conduct, which Members and Company Partners are obliged to follow.

The requirements which use the phrase "should" describe implementation and denotes a recommended practice.

"May" or "can" refer to the ability to do something, the possibility of something, as well as granting permission.

MRS Code of Conduct

The following MRS Code of Conduct (2019) rules, which are extracted from the *Business and Professional Ethics* section of the Code, are the fundamental rules from which this guidance has been created:

Rule 6: Members must act honestly in their professional activities.

Rule 7: Members must take reasonable action to ensure that others do not breach or cause a breach of this Code.

Rule 8: Members must not act in a way which might bring discredit on the profession, MRS or its Members.

Rule 9: 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.

The rules regarding vulnerable participants are also essential:

Rule 23. Members must take reasonable steps to assess, identify and consider the particular needs of vulnerable people involved in their professional activities.

Rule 24. When working with vulnerable people, Members must ensure that such individuals are capable of making informed decisions and are not unfairly pressured to cooperate with a request to participate and that they are given an opportunity to decline to take part.

In addition, the following data collection rule is key to the guidance, particularly point 28 (a):

Rule 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*

Finally, the MRS Code of Conduct consent rule 31 also applies, noting in particular that health data is defined as special category data within the Data Protection Act 2018 and GDPR and the requirements of this legislation must be adhered to when such data is being collected.

Rule 31: If consent is the legal basis for the data collection, Members must ensure that participants are provided with appropriate information to allow informed consent to be given, at the point that they agree to participate. Informed consent requires the following information to be provided:

- 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) the use of automated decision making (if used)
- k) transfer of data to a third country;
- l) retention periods or criteria used to determine retention periods;
- m) the right to complain
- n) an assurance that the activity is being conducted in accordance with the MRS Code of Conduct and the Data Protection Act 2018 and/or local data protection legislation for non-UK activities.

MRS Guideline: Conducting Mystery Shopping

The requirements of the [MRS Guideline: Conducting Mystery Shopping](#) (March 2020) must also be referred for more general requirements when undertaking any form of mystery shopping.

Relevant Definitions

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.

Clinically extremely vulnerable individuals¹: individuals who have specific underlying health conditions that make them extremely vulnerable to severe illness if they contact Covid-19. See [government guidance](#) on who is defined as clinically extremely vulnerable. Individuals in this group will have received a letter from the NHS or their GP informing them they are classified as clinically extremely vulnerable.

Clinically vulnerable people²: individuals who may be at moderate risk from Covid-19 including those aged 70 years or older and individuals with some underlying health conditions. See [government guidance](#) on who is defined as clinically vulnerable.

Consent: means any freely given, specific, informed and unambiguous indication of a participant's wishes by a statement or by a clear affirmative action, which signifies agreement to the processing of their personal data.

Face coverings: a non-surgical (or other medical grade) mask for facial covering of the mouth and nose, that is made of cloth or other textiles, and through which an individual can breathe e.g., a scarf. See government guidance on [Face coverings: when to wear one, exemptions, and how to make your own](#).

Face-to-face Mystery Shopping: the use of research practitioners trained to experience and measure any customer service process, by acting as potential customers within physical environments e.g. in shops, restaurants, hotels, car showrooms as opposed to via other mediums such as telephone or online (see mystery shopping definition for further detail).

¹ Alternative terms used by the devolved governments include 'extremely high risk' or 'extremely vulnerable'

² Alternative terms used by the devolved governments include 'high risk' or 'vulnerable' the latter is different to the MRS definition of vulnerable

Mystery shopping: *the use of research practitioners trained to experience and measure any customer service process, by acting as potential customers and in some way reporting back on their experiences in a detailed and objective way for research and/or other purposes. It differs from other data collection techniques in that researcher practitioners do not declare their presence and participants are unaware at the time of the interaction that it is in any way different from a normal customer contact.*

Participant: *is any individual or organisation from or about whom data is collected.*

PPE: *protective equipment which protects users against health and safety risks. It can include items such as safety helmets, face masks, gloves, eye protection, high-visibility clothing, safety footwear, etc.*

Protected Characteristics³: *the groups protected from discrimination in the workplace as defined by the Equality Act 2010. It is against the law to discriminate against anyone because of age, gender reassignment, being married or in a civil partnership, being pregnant or on maternity leave, disability, race, religion or belief, sex or sexual orientation.*

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.*

Research Practitioners: *includes all individuals within the research supply-chain e.g. researchers, moderators, interviewers, recruiters, mystery shoppers, contractors, freelancers and temporary workers.*

Social Distancing (can be called 'physical distancing'): *limiting face-to-face contact with other individuals by means of keeping space between people.*

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](#)).*

Codeline

The MRS Standards Team are continuing to review and update the MRS guidance as and when required.

If you have any queries about the MRS Code or any of the [MRS' Covid-19 guidance](#) please contact the MRS Standards Team via the MRS Codeline service (codeline@mrs.org.uk).

Before the Commencement of Mystery Shopping Projects

Research Practitioners: General

1. If research practitioners begin to feel unwell and/or have been in contact with anyone who has been unwell and/or is feeling unwell they must self-isolate and work from home (if the individuals are fit to do so and their role enables home working).

³ See the UK Government website for more details: <https://www.gov.uk/discrimination-your-rights>

Research Design: General

2. Research practitioners must undertake a risk assessment of any proposed mystery shopping exercise before beginning any activity. The MRS Research Policy and Standards Webinar – Undertaking Risk Assessments’ can be found in the webinar library here <https://www.mrs.org.uk/resources/webinars>
3. Research practitioners must use and adhere to the appropriate government safe working guidance depending upon the environment/s in which face-to-face mystery shopping is to take place. The current list of safe working guidance is listed for England here: <https://www.gov.uk/guidance/working-safely-during-coronavirus-covid-19>.
4. Research practitioners must follow relevant government guidance such as the Health & Safety Executive (HSE) guidance on Covid-19: <https://www.hse.gov.uk/news/coronavirus.htm> and the HSE interactive tools: <https://www.hse.gov.uk/simple-health-safety/risk/index.htm>

Note: More information about risk assessments is available in the MRS Research Policy and Standards Webinar - Undertaking Risk Assessments available here: <https://www.mrs.org.uk/resources/webinars>.

5. When designing face-to-face mystery shopping projects research practitioners must discuss with clients (whether internal or external) the outcome of any risk assessments and agree any mitigations to be undertaken including adapting the research design to reduce Covid-19 risks, exposure and infection. **As part of this discussion, research practitioners must determine whether face-to-face mystery shopping is the most appropriate method.**
6. When designing face-to-face mystery shopping a key consideration will be the use of facial coverings and gloves by research practitioners. Research practitioners must discuss with clients the range of body coverings and equipment available and agree an approach, which will depend upon the outcomes of any initial risk assessment, including considerations such as:
 - The mystery shopping approach being used
 - The environment where the research is to take place
 - Whether social distancing is feasible
 - The profile of participants e.g. age, health, demographics
 - The potential impact on mystery shopping outcomes e.g. customer service assessment if verbal communication is impaired
 - The potential impact on the quality of the mystery shopping data gathered if communication is impaired
7. Once it has been agreed that a face-to-face mystery shopping approach will be undertaken the research practitioners must discuss and agree with clients liabilities for risks identified and actions taken to ensure that identified risks and liabilities form part of the contract for mystery shopping projects.

Research Practitioners: Mystery Shopping Practitioners

Once requirements 1-7 have been undertaken, and it has been determined that a face-to-face mystery shopping approach is the most appropriate the following requirements apply:

8. Research practitioners who are classified as ‘clinically extremely vulnerable’ individuals (see definitions) are advised by the government to stay at home as much as possible and to work from home. As such research practitioners who are clinically extremely

vulnerable must not undertake any face-to-face data mystery shopping activities. Research practitioners who are clinically extremely vulnerable may undertake and/or be selected for other methods of data collection e.g., telephone, online, mail.

9. Research practitioners who are classified as clinically vulnerable individuals (see definitions) should follow social distancing advice to reduce the likelihood of catching or spreading Covid-19. Research practitioners that are identified as clinically vulnerable who are fit and wish to work, may be considered for face-to-face mystery shopping activities.
10. Research practitioners must undertake a risk assessment and undertake mitigations before any clinically vulnerable individuals are considered for face-to-face mystery shopping. Research practitioners who are clinically vulnerable may undertake and/or be selected for other methods of mystery shopping e.g. telephone, online.
11. Before eligible research practitioners are selected for face-to-face mystery shopping projects Covid-19 screener questions must be asked to determine if any research practitioners are infected and/or are at risk of infection. Screeners must include appropriate considerations, which will depend on the outcome of any initial risk assessments, such as:
 - Whether practitioners have received a Covid-19 vaccine.
 - Current state of health of research practitioners and their immediate households
 - Whether research practitioners and/or members of their immediate household have been diagnosed and/or tested for Covid-19
 - Whether research practitioners and/or members of their immediate household have been exposed to individuals who have been unwell and/or diagnosed and/or tested for Covid-19
 - Whether research practitioners are shielding or caring for individuals vulnerable to Covid-19 within their household
 - Current emotional health and personal confidence of research practitioners to undertake mystery shopping projects
 - The use and impact of contact tracking apps on research practitioners' activities
 - The needs of those with protected characteristics
 - Any specific research practitioners' concerns regarding face-to-face mystery shopping
12. Research practitioners who respond to screener questions which indicate a state of health and/or circumstances which are unsuitable for face-to-face mystery shopping and/or a high risk of Covid-19 infection must not be selected for face-to-face mystery shopping until such time as there is evidence that they are no longer infected with Covid-19 and/or a state of health/circumstances which is suitable for such activity.
13. The Covid-19 screener questions, which include the collection of special category health data (both physical and mental health), must only be collected with the informed consent of research practitioners (see MRS Code of Conduct rule 31).
14. When recording the responses to screener questions no inferences and/or formal records must be made regarding the health of research practitioners without their informed consent.
15. Research practitioners who have been identified as high risk for Covid-19 infection (such as clinically extremely vulnerable or clinically vulnerable) and/or diagnosed with Covid-19, if well enough to work, may be used for other mystery shopping projects and/or data collection such as telephone or online activities.

16. Before research practitioners undertake any face-to-face mystery shopping projects, they must be trained on how to undertake such activity in post-lockdown conditions. Training must include appropriate considerations, which will depend on the outcome of any initial risk assessments, such as:

- Understanding the government safe working requirements and following updates for any particular work environment where face-to-face mystery shopping is being undertaken
- Understanding the potential risks of undertaking any given mystery shopping project
- When and where mystery shopping can safely take place
- Locations, times and circumstances to avoid when undertaking face-to-face data mystery shopping
- Considering the needs of those with protected characteristics, such as those who are hearing or visually impaired
- Wearing of face coverings and gloves, how to ensure maximum effectiveness ([see government guidance on when to wear one, exemptions, and how to make a cloth face covering](#)) and when the use of face coverings and gloves may be appropriate⁴
- Avoiding physical contact and touching of faces particularly noses, eyes and mouths
- Determining social distancing requirements
- Removal and discarding of any cleansing materials e.g. sanitary wipes, tissues, etc used during mystery shopping projects
- The use and potential impact of contact tracking apps on mystery shopping activities

Travel To and From Face-to-face Mystery Shopping Projects

17. Research practitioners must consider the amount of travel required to undertake face-to-face mystery shopping projects and introduce approaches which minimise the amount of travel required e.g. localise data collection to specific areas.

18. Research practitioners when travelling for face-to-face mystery shopping projects, must plan ahead or avoid busy public transport times and routes.

19. Research practitioners must follow any lockdown travel restrictions which apply to each of the UK's four nations if face-to-face data collection requires travel to any of these areas e.g. undertaking face-to-face mystery shopping close to the four nation borders.

20. Research practitioners should not travel beyond their local area for face-to-face mystery shopping purposes unless absolutely necessary for the purposes of the project.

Overnight Stays

21. Research practitioners should not stay overnight anywhere other than their primary residences except for business purposes. Research practitioners should make appropriate plans to minimise such overnight stays.

Vehicle Sharing

⁴ Whilst in some instances, gloves are recommended for face-to-face data collection activities, this recommendation is due to the nature of activities undertaken in the course of face-to-face data collection and is not an appropriate alternative, in this context, to handwashing and sanitising.

22. Research practitioners must reduce, where possible, the amount of vehicle sharing they undertake when travelling to and from face-to-face mystery shopping projects.
23. Research practitioners who share vehicles with colleagues (e.g. car share) to travel for face-to-face mystery shopping must follow the appropriate Government guidance on vehicle sharing e.g. the UK Government's [guidance on car sharing](#).

During Face-to-face Mystery Shopping Projects

There are some Covid-19 requirements and considerations which apply to all types of face-to-face mystery shopping projects, whilst others are specific to the type of project environment.

In this section the guidance applies irrespective of the type of data collection.

24. When undertaking face-to-face data collection research practitioners must [wear a face covering in those areas where this is mandated](#) and in any locations where it is not possible to maintain a social distance of two metres when undertaking face-to-face data collection.
25. Research practitioners must continue to follow social distancing rules when undertaking face-to-face data collection.
26. In circumstances where social distancing may not be possible such as using mystery shopping techniques, research practitioners must endeavour to ensure there is enough space to undertake their face-to-face data collection activities safely, where possible adhering to social distancing requirements and not causing obstruction to other individuals, the possibility of contact and/or not meeting social distancing requirements with other individuals in the vicinity of any given project.
27. Research practitioners must check whether additional restrictions apply in their area, particularly if working close to any of the four nations' borders.
28. Research practitioners must follow any other local lockdown restrictions which could be imposed in specific areas and/or locations.
29. When research practitioners undertake any face-to-face mystery shopping they must:
 - a) Familiarise themselves with any potential Covid-19 environmental/circumstantial risks of undertaking mystery shopping projects e.g. busy peak times in mystery shopping locations when social distancing may be difficult
 - b) Position themselves in a location where they are able to adhere to social distancing requirements with other customers, staff, etc
 - c) Take steps to reduce risk of exposure to infection if working in an environment where social distancing may not be possible e.g. public transport
 - d) Consider changing mystery shopping environments where social distancing is challenging e.g. if a bus is crowded, getting off the bus and waiting for another quieter bus to complete a journey
 - e) Avoid people who look visibly unwell
 - f) Carry tissues, sanitary wipes and/or other types of personal cleaning aids and throw away in a bin any cleaning aids after use
 - g) Avoid touching their nose, mouth or eyes
 - h) Avoid any physical contact
 - i) Consider the appropriateness of wearing of face coverings and gloves e.g. understand those environments where facial coverings are required, etc.

In-store Face-to-face Mystery Shopping

30. Before commencing any in-store face-to-face mystery shopping activities research practitioners must ensure adherence (where appropriate) with the UK government's safe working documents. Relevant documents for in-store face-to-face mystery shopping includes: [Working safely during Covid-19 in shops and branches](#), [Working safely during Covid-19 in heritage locations](#) and [Working safely during Covid-19 Restaurants, pubs, bars and takeaway services](#) guidance, or equivalent guidance in the country where face-to-face mystery shopping is being undertaken.
31. Research practitioners must adhere to any additional safe working Covid-19 guidance which applies to any in-store environment, e.g. specific retailers or shopping centre guidance, the requirement to wear facial coverings in retail outlets, etc.
32. Research practitioners must endeavour to ensure there is enough space to undertake in-store face-to-face mystery shopping safely, where possible adhering to social distancing requirements and not causing obstruction to other individuals in the vicinity and/or the possibility of contact and/or not meeting social distancing requirements with other individuals in the vicinity.

In Transit

33. Before commencing any in-transit face-to-face mystery shopping activities research practitioners must ensure adherence (where appropriate) with the UK government's safe working documents. Relevant documents for in-transit includes: [Coronavirus \(Covid-19\): safer travel guidance for passengers](#) and [Working safely during Covid-19 in or from a vehicle](#), or equivalent guidance in the country where face-to-face data mystery shopping is being undertaken.
34. Research practitioners must adhere to any additional safe working Covid-19 guidance which applies to any in-transit environment, e.g. specific transport owner's corporate guidance, the requirement to wear facial coverings on public transport in England, etc.
35. Research practitioners must endeavour to ensure there is enough space to undertake in-transit face-to-face mystery shopping safely, where possible standing or sitting in adherence with social distancing requirements and not causing obstruction to other individuals in the vicinity and/or the possibility of contact and/or not meeting social distancing requirements with other individuals in the vicinity.

In Venues

36. Before commencing any in-hall/venue face-to-face mystery shopping activities research practitioners must ensure adherence (where appropriate) with the UK government's [Closing certain businesses and venues in England](#), the [Staying alert and safe \(social distancing\) guidance](#) in terms of venues that can and cannot be accessed and/or visited and the rules regarding numbers and types of social gathering.
37. Research practitioners must ensure adherence (where appropriate) with the UK government's safe working documents. Relevant documents for in venues such as:
 - [Working safely during Covid-19 in restaurants, pubs, bars and takeaway services](#) and associated guidance or equivalent guidance in the country where face-to-face mystery shopping is being undertaken, when food and drink consumption is part of their face-to-face mystery shopping activities.

38. Research practitioners must adhere to any additional safe working Covid-19 guidance which applies to in-venues environment e.g. specific venue owner's corporate guidance, wearing of facial coverings (if required), etc.
39. Research practitioners must endeavour to ensure there is enough space to undertake in-venue face-to-face mystery shopping safely, where possible standing or sitting in adherence with social distancing requirements and not causing obstruction to other individuals in the vicinity and/or the possibility of contact and/or not meeting social distancing requirements with other individuals in the vicinity.

Support for Research Practitioners

[The Market Research Benevolent Association](#) (MRBA) exists to provide financial support and advice to practitioners who work or have worked in any aspect of research and are based in the UK. Research practitioners should provide details of the MRBA to any research practitioners who are experiencing financial difficulties due to Covid-19 and are not being supported by other means (such as the Coronavirus Job Retention Scheme).