SAMRA
Southern African Marketing Research Association
Quality Research • Quality Decisions

GUIDELINES FOR QUALITATIVE RESEARCH PARTICIPANT RECRUITMENT

13 November 2013

PO Box 1713 | Randburg 2125 | Third Floor | 264 Oak Avenue | Randburg
Tel: +27 11 886 3771 | Fax: +27 11 886 9721 | e-mail: info@samra.co.za

TABLE OF CONTENTS

1. RESEARCH PARTICIPANT RECRUITER PROFILE

Research participant recruiting is any form of contact with (potential) research participants (incl. individuals or organisations) in order to collect information from them, for research purposes during a data collection event (e.g. focus group interview or In-Depth Interview). In this document, 'client' refers to any individual or organisation that makes use of a research participant recruiter (i.e. recruiter client). 'Recruiter' should be interpreted as including 'recruitment agency'.

What makes a recruiter great?

Skills

- Plan, organise and schedule – work methodically
- Time management
- Multi-tasking
- Lateral thinking
- Very good communication skills (incl. telephonically and face to face)
- Etiquette on the phone with clients and research participants
- Interpersonal/People skills
- Assessing people and personalities
- Administration and project management
- Developing partnerships and networks
- Listening to others (incl. potential research participants and particularly the voice of sub-contractors who are familiar with a particular territory)
- Computer literate (email, spreadsheets)
- Asking questions to fully understand the brief
- Giving directions to late / lost research participants

Knowledge

- LSMs, LSM criteria and income criteria
- Recruitment and research process and methodology
- Qualitative research
- Demographics (of South Africa, if recruiting nationally, and with a local partner, if recruiting internationally)
- How a group works (incl. have been to a group)
- The purpose of the research
- Briefing requirements
- Some marketing knowledge
- Location of venues

Personal Characteristics

- Able to handle stress
- Accept that recruiting is not easy and can mean odd hours of work
- Respect for others
- Intuition
- Determination
- Diligent
- Patience and understanding
- Integrity, honesty, professional, ethical, trustworthy
- Attention to detail
- Able to work independently
- Flexibility
- Extrovert
- Talkative
- Persevering
- Punctual
- Available
- A sense of humour and a skin as thick as a rhino also helps!

2. RESEARCH PARTICIPANT RECRUITING STANDARDS

The following terms and conditions and service standards are suggested when contracting with a client to supply research participant recruiting services:

2.1 Briefing and Contracts/Service level agreements

- The terms and conditions and service levels must be agreed contractually before work commences, by means of a signed, legal contract or service level agreement.
- Good practice dictates that recruiters should always have the exact brief and job specifications in writing and should clarify these before commencing. These should include at the very least the purpose of the research, the thinking behind the project, and the required research participant profile, provided that all existing confidentiality agreements are upheld.
- A recruitment job cannot be put in field based on an e-mail and attachment sent. Each job should be briefed in writing, and telephonically or personally, if not a repeat job.
- Ideally, a quote should be submitted for each job stipulating the data collection events, times, numbers, demographics, incentives and recruitment costs, etc. to avoid any confusion.
- The briefing documents and quote can form the basis of the contract or service level agreement between the recruiter and the client.

2.2 Recruitment Fees

- Recruitment fees should be agreed upfront.
- Higher fees that are charged for more difficult recruits and list recruiting should be specified.
- Recruiters generally pay sub-contractors, which may require a 14 to 30 day maximum payment period. There is no contractual agreement between the client and a recruiter's sub-contractors. Recruiters should have a separate service level agreement with sub-contractors that meets the requirements of the recruiter's service level agreement with their client.
- When a project is done in stages, for example, by province, the recruiters should be paid for work completed in stages, and not have to wait until the entire project is completed. Especially for large and lengthy projects payment should be made in stages and not only at the end of a project, which could continue for months.
- Payment should not be linked to when the client receives payment from their client. Work that is completed and invoiced in time for the agreed payment cycle should be paid. Payment for services rendered by a recruiter should not be withheld on the basis of non-payment by another party.
- Any queries about recruitment quality should be discussed before refusal to pay, and refusal to pay can only be based on proof or evidence.

2.3 Cancellation and Modification Fees

Cancellation and Modification Fees are charged in accordance with the service level agreement between the recruiter and client. For example, if:

- A data collection event time or date is changed, and provided the changes are made within an agreed time limit. The candidates who confirmed should be re-contacted, and that can result in cancellations, as the new date or time might not suit them, resulting in a need to replace the candidate. A 10% to 20% fee per research participant may be charged for making the change, to cover time and telephone costs. In addition, a 50% to 100% fee may apply to all research participants who cancel if the move is being made more than 48 hours before the original time and date of the data collection event, and 100% of the recruitment fee may be payable for all research participants who cancel if a change is made less than 48 hours of the original time and date and/or for any research participants who must be replaced. The recruiter should be paid for all correctly recruited research participants that can or cannot make it to a changed data collection event, and for correct replacements for research participants unable to make the original agreed event or the changed event. If a client makes a change with a research participant directly, the recruiter cannot charge for the change.

- A data collection event is cancelled (or put on hold indefinitely). The client may be charged 50% for a cancelled data collection event, if more than 48 hours before the data collection event, and 100% if less than 48 hours before the data collection event for all or any research participants already recruited. Cancellation fees only apply to research participants whose details have been submitted to the client and confirmed as being correct.
- Recruitment criteria are changed (e.g. race, age, gender, products used) after the job has been put in field. The client is charged 100% of all or any research participants recruited. Recruiters furnish recruited research participant details at the time of cancellation.

2.4 Time for Recruiting

- Recruiters and their clients should agree on the time frame for recruitment and this should be included in the service level agreement.
- Although no minimum number of days can be prescribed, recruiters in general need a minimum of 7 full days for recruitment. Thus, if the job is briefed in on a Wednesday, the first data collection event should be no sooner than the next Wednesday. There should be a minimum of 10 days in field for lists and specific occupations such as doctors and CEOs of companies.

2.5 List Recruiting

- Due to the complexities, costly time and telephone costs involved, list recruiting is charged at a premium. Generally, recruiting upper LSM people off lists need a higher incentive to get them to a data collection event.
- If lists yield no research participants who qualify within 1 to 2 days, the client should assess the situation and revert to the list owner (if applicable) to either provide better lists for recruiting or to consent to not recruiting off lists. If lists are not adequate for the criteria, groups may need to be moved as the recruiter may not be able to fill them in time.
- Incentives for research participants off lists should be considerably higher to attract research participants and prevent no-shows. Recruiters also need to over-recruit by more than 1 person to compensate for no-shows.
- When lists are provided, the client should make available a letter of invitation from the research user organisation informing research participants that they have authorised the issuing of lists and that the recruiter has been given permission to contact them. The letter should also state the purpose of the research, the incentive, etc. The recruiter should be given permission to tell research participants where the list comes from.
- Quality of lists is critical. Only up to date lists should be supplied. Information such as residential areas, land line numbers (home and work), etc. should be included. It is a waste of time to phone

from a list with no geographic area information: a recruiter does not want to phone somebody in Rustenburg to attend a data collection event in Johannesburg.

- Especially for low LSM research participants, the recruiter should speak the language of the potential research participant. Middle and high LSM research participants can be recruited by anybody. For business-to-business recruiting and high LSM recruiting, ensure that the recruiter is well spoken, 'upmarket' and has credibility.
- Lists should be verified in terms of the recruitment criteria (e.g. race, gender, age, have to product, etc.). Recruiters are typically not paid for time spent and telephone costs incurred using a list that does not yield results. If this is due to a poor quality list, fees should apply. A hit rate of 1 in 10 research participants answering the phone and qualifying for the data collection event is acceptable. When the hit rate approaches 1 in 20 calls, all parties should be informed and alternative options should be discussed.

2.6 Recruiting off Own Database

- For upper LSM recruitment, confirm with the client whether they need to approve an e-invite. This is sent to potential research participants and recruiters commit to wording that is not leading (i.e. including too much information regarding the recruitment criteria), but assists with filtering potential candidates. For example:

  - If there is a data collection event for a specific cigarette brand and pack shape, the recruiter will mention that it is for smokers, and potential research participants should then provide their brands and or pack sizes / shapes unsolicited.
  - If the data collection event is about Cider, potential research participants list their favourite drinks and brands used. Most of the time potential research participants know only that a data collection event is about drinks and not specifically cider (in this example), unless the screener makes it obvious.

- Emails save huge amounts of time and there should be no difference between telephoning somebody and asking what s/he smokes, drinks, etc. and asking her/him to complete a recruitment questionnaire (screener) on an e-invite.
- For recruitment profiles that are so unique that they do not resemble a broader target group, a premium is charged for recruitment, as it takes more time and effort to find those research participants (e.g. an LSM 10, with no credit card, or an LSM 6 with life insurance policies besides funeral insurance).
- Conflicts of interest arise when one person is both a recruiter and moderator, or when recruiter friends and family of recruiters are recruited by the recruiter: this should be avoided, and lists should not include such people.
- In general, research participants should not participate in research more than once in six months, even if they are recruited for a different client, or for a different product or service. Research participants should not be allowed to attend more than four data collection events in their lifetimes. After the fourth event, they should be flagged as ineligible for any research.
- Great care should be taken to filter out what is referred to as 'groupies' (i.e. people who deliberately and frequently participate in research for the purpose of generating income, whether they qualify for participation in the research, or not).
- Recruiters should not share their databases with other recruiters.

2.7 Intellectual Property

- Research participant data is owned by the party that originates the gathering of the information. Therefore, a venue supplier or client is not allowed to use a recruiter's research participant information for any future recruiting if the recruiter gathered such information prior to receiving a relevant recruitment brief from a specific client (i.e. their details have been collected at the cost of the recruiter). Where a research participant is recruited (i.e. for the first time) in response to a brief, the originator of the brief is generally considered the owner of the information.
- Notwithstanding the above, a research participant that is recruited for a specific data collection event (e.g. a specific focus group discussion) can be contacted for that event only, unless they agree to re-contact.

2.8 Back-checking

- The service level agreement between the recruiter and the client should stipulate:
  - **Who is responsible for back-checking and the process to be followed**, for example:
    If the client does back-checking and cancels a research participant, the client should clarify whether they tell the research participant at the time of back-checking or whether they expect the recruiter to do this. If the recruiter is required to cancel, the client should back-check in time, and should not expect the recruiter to cancel at short notice (i.e. a few hours before an event, or when the research participant is en route to the event). Back-checking by the client cannot be done on the day of the data collection event: if replacements are needed, the client should allow recruiters at least 24 hours to replace. If the research participant profile for a group data collection event is not homogenous (e.g. split in terms of race, gender, age and/or products used), it is especially difficult to find a late replacement, and over-recruitment is thus advisable.
    If the recruiter is responsible for back-checking, the client should determine the criteria for back-checking. The recruiter should send research participant lists to the client at least 1 to 2 days before the data collection event, even if they are missing one or two research participants.
  - **The purpose of back-checking**, which can include quality control of the work of recruiters and sub-contractors, quality control of the potential research participant in relation to the purpose of the research and the recruitment criteria, and or confirming that the recruited research participant will attend the data collection event.
  - **The percentage of back checks**, which can vary from spot checks to checking each potential research participant, depending on the nature of the research.
  - **Criteria for back-checking**, which can range from going through most of the recruitment questionnaire again, to double checking specific information such as identity numbers, telephone numbers, or confirming the data collection event date, time and venue. Research participants can become resistant and may withdraw if they feel pestered or too chased after, especially new research participants off lists. The best way to curb fraudulent participation is to insist on positive identification (e.g. identity document and number). The recruitment questionnaire and variables must match the back-checking questionnaire and variables, especially regarding non-negotiable criteria.
- Irrespective of who does the back-checking, the recruiter should ensure that back-checking takes place.

2.9 Homework

- Recruitment of research participants for research that requires homework may incur extra recruitment charges, and over-recruitment is advisable. If a research participant cancels it is very difficult to get a replacement that can do homework in a short space of time.
- A delivery fee may be charged if product or homework must be delivered.
- Incentives should reflect the time and effort that homework will require.

2.10 Data Collection Event Timing

- Often clients come from out of town and pressurise the recruiter to fit 2 to 3 focus group interviews in a day. However, some time slots are very difficult to recruit for. For example, very few females these days are "housewives" and those who are have very little time, as they are not working for a reason: they are running small home-businesses, managing the children, helping their husbands, doing housework, etc. Even working parents' free time is a very precious commodity. Scheduling a focus group interview at 4 pm means only flexible full time working people can participate, and there is a limited pool of those. Depending on the location of the venue, even a 5 pm start can be a challenge due to traffic.
- Do not specify that a data collection event is scheduled for 1 hour and then it takes 1.5 hours of the research participants' time. This does not promote the goodwill needed for future participation or referral.

2.11 Paying off Research participants

- Recruiters and recruitment clients should have policies and procedures in place regarding paying off research participants (e.g. circumstances, processes and value). The implementation of these should be agreed as part of the service level agreement, before work commences. For example:

  - Focus group interviews must start on time. Recruiters request research participants to arrive 10 to 15 minutes earlier to register and settle in. Traffic, especially to some venues in Johannesburg, poses a challenge. Research participants who arrive on time get restless and annoyed that they have to wait for those who are running late. If there are enough research participants and the focus group interview starts, an extra candidate who arrives 5 to 10 minutes late should be added to the focus group interview or paid off. These people often have the best intentions to be there on time, and will not be prepared to make other focus group interviews in the future if they feel they are being unfairly treated.
  - If a recruiter has back checked a research participant and confirmed information about, for example, product usage, on the recruitment questionnaire, including for example, an update sheet or screener, and the research participant subsequently provides different information at the data collection event that disqualifies them for the data collection event, the research participant should be sent home without an incentive and the recruiter should not use the research participant again. The recruiter will not be held financially responsible for paying off such a research participant.
  - Research participants should be informed during recruitment that they will not receive the incentive if they do not meet the criteria.

2.12 Specific Target Group Challenges

- Some profiles have to be over recruited more than others. High LSM research participants generally have a better attendance rate than low LSM. In the former instance, recruiting 7 for 6 people to arrive for the focus group interview is adequate for the criteria, whereas the latter requires recruiting 9 for 6 people to arrive for the focus group interview. This should be taken into account when quoting. It is not easy to recruit 6 for 6 in a low LSM group. Recruiters should over-recruit by at least 1 to 2 for low LSM data collection events, especially where transport is provided. Often these research participants cannot get to the taxi meeting point (e.g. from work) in time and a data collection event is put in jeopardy.
- Clients should allow for transport costs for any LSMs below 7. Transport to and from focus group interviews is recommended for low LSM focus group interviews, as potential research participants are eager, but they cannot get home after a focus group interview finishes at 8 pm or 10 pm.
- Sensitivity about race may be difficult to handle. For example, if one mentions that a focus group interview is for Whites only, often Black, Coloured or Indian people are offended. Recruiters should be tactful and sometimes make judgment calls about the racial group they think potential research participants fall into.
- Older potential research participants are often excluded. However, they often give very good feedback, have more time and have more disposable income to buy products.
- South Africa has a large population, but certain areas are completely left out whenever recruiting, mainly based on their location and the centralised location of venues. This increases the likelihood of ‘recycled’ research participants. Recruiters are encouraged to apply more creative approaches that will create vibrant and robust recruitment practices.
- The required window period before re-recruiting a potential research participant, especially at a professional level and for in-depth interviews (e.g. interviewing the decision maker at an organisation regarding information technology, fleet or travel expenses, etc.) is often debated, and some recruiters are of the opinion that such persons can be contacted more often and within the currently required window period, if the person meets the recruitment criteria. Similarly, the number of research users in the telecommunications industry is limited, and they do a large amount of research often with the same target market, making it very difficult to find new potential research participants all the time. When different concepts are tested, some recruiters feel that the same decision makers could be asked to participate in a new study about a new topic. The window-period must be agreed by the recruiter and client before work commences.

2.13 Advertising and Incentivising Research Participation

- It is imperative that public confidence in the integrity of research is maintained. For this reason, any advertisement soliciting research participation should not divulge projects details, such as qualifying criteria, which could jeopardise the validity of the recruitment process. Wording that specifies the characteristics that a person should have to qualify is not acceptable. If advertising sites such as Gumtree and OLX, consumer forums and internet advertisements are used to recruit research participants, great care should be taken with the wording.
- The wording of recruitment materials should be approved by the client. The wording should not give too much information about especially the criteria and the incentive, and especially if advertising channels are used.

- Research participants should not have to pay any kind of fee for participating in research, including joining research panels or groups, completing surveys online, participating in focus group interviews, product testing at home or participating as a mystery shopper.
- Although not illegal in South Africa, the practice of charging a research participant to participate in research or join a research panel/group may be considered exploitative and is frowned upon. Research participation should always be voluntary and paying for participation may coerce the person to do so once they have incurred the expense, irrespective of how small the cost or joining fee is. Participation in research and membership of research panels should be free of charge.
- Participation in research should under no circumstance be seen as a job, source of income or career option. People are requested to participate in research because they have particular characteristics and, therefore, represent a group of interest to, and can provide valuable information that assists, marketers and other decision makers. The research industry relies on the goodwill of members of the public to participate in research and to provide information on behalf of other members of the public for the greater good. The wording used during recruitment must explain that incentives are a token of appreciation for time, effort and contribution, and not a means of making money.
- Although it is acceptable and common practice to give research participants a token of appreciation for their time and effort - this could be products, discounts, gift vouchers, or even cash - it should under no circumstances be seen as payment for participation. No paid-for service is being rendered by research participants to the recruiter or client and research participants are not employed by the recruiter or client as a research participant. Generally, reputable research organisations will insist that research participants are not regularly involved in research (e.g. not participating more than once every six months) to ensure that this practice does not take place.
- An appropriate incentive makes it possible to recruit, especially in higher LSM target groups, where 'time is money'. When asking a research participant for their time to do an in-depth interview or go to a focus group interview, it should be beneficial to them. Two hours at a focus group interview means a commitment of three or more hours (incl. travel time to and from the focus group interview). One needs to determine whether a potential research participant would be willing to attend a data collection event for the identified incentive, for example, if the person is earning a particular monthly salary, has a full time job and two small children at home. Recruiters and field supervisors can advise their clients in this regard. Recruiters should not take on projects if they feel the incentive will not convince the target group to participate in the research.

2.14 Consent Forms

- For teens and children, a consent form is required (either from the school, where applicable, or a parent/legal guardian. Wording should not be used that could jeopardise the validity of the recruitment process. The recruiter and client as well as the purpose of the research should be clearly identified, and it should be clear how the credentials of the recruiter and client and the legitimacy of the project can be confirmed.

2.15 Leads (Snowball Sampling)

- If a research data collection event is very specific or difficult, the recruiter may ask for leads from other research participants who qualify. If this is the case, the recruiter will inform the client of this.

- Friends, family, and those sharing a home should not be included in the same focus interview discussion. People who are acquaintances (e.g. parents of children who attend the same school, people who work for the same organisation) and do not know each other can be recruited for the same data collection event.

3. ETHICAL RESEARCH PARTICIPANT RECRUITING

This section is based on the SAMRA/ESOMAR Code of Conduct and Guidelines. What follows is a summary of the Code. The Code should always be read in conjunction with the Notes on How to Interpret the Code and the various Guidelines for specific types of research. For the full Code and Guidelines, please see http://www.esomar.org/knowledge-and-standards/codes-and-guidelines.php, including:

- Guideline for conducting mobile market research and other resources
- Guideline on Social Media Research
- Guideline for Online Research
- Distinguishing market research from other data collection activities
- Passive data collection, observation and recording
- Interviewing children and young people
- Mutual rights and responsibilities of researchers and clients
- Mystery shopping studies

Market research, which includes social and opinion research, is the systematic gathering and interpretation of information about individuals or organisations using the statistical and analytical methods and techniques of the applied social sciences to gain insight or support decision making. The identity of research participants will not be revealed to the user of the information without explicit consent and no sales approach will be made to them as a direct result of their having provided information.

Research participant recruiters will:

- Not break any laws of the countries where they recruit research participants.
- Behave ethically and not do anything which might damage the reputation of research.
- Take special care when carrying out research among children and young people.
- Ensure that research participants' cooperation is voluntary and based on adequate, and not misleading, information about the general purpose and nature of the project when their agreement to participate is being obtained and all such statements should be honoured.
- Respect the rights of research participants as private individuals and will ensure that they are not harmed or adversely affected as the direct result of cooperating in a research project.
- Never allow personal data they collect in a research project to be used for any purpose other than research.
- Ensure that projects and activities are designed, carried out, reported and documented accurately, transparently and objectively.
- Conform to the accepted principles of fair competition. In South Africa, the principles are contained in various pieces of legislation, including the Competition Act (89 of 1998, as amended in the Competition Amendment Act 1 of 2009).

ARTICLE 1: BASIC PRINCIPLES

- Do not break any law.
- Be honest, truthful and objective.
- Recruit in accordance with appropriate scientific principles.
  Note: Qualitative research is a type of scientific research. This implies following a methodical / systematic, predefined set of procedures when recruiting research participants, for example, ensuring

that recruitment criteria are adhered to, and recruiting in a way that does not introduce undue bias or facilitate fraudulent research participants. Recruitment should contribute to ensuring that the required information can be obtained during the data collection event, and that the topic can be examined with the specified target group from their authentic perspective.

- Do not bring discredit on the research profession or act in a way that will lead to a loss of public confidence in it.
- Take professional responsibility and conform to the principles of fair competition, as generally accepted in business.
- Clearly distinguish and separate research recruitment from non-research activities including any commercial activity directed at individual research participants (e.g. advertising, sales promotion, direct marketing, direct selling etc.).

ARTICLE 2: HONESTY

- Do not abuse the trust of research participants or exploit their lack of experience or knowledge.
- Do not make false statements about your skills, experience or activities, or about those of your organisation.

ARTICLE 3: PROFESSIONAL RESPONSIBILITY

- Research participants’ co-operation in a research project is entirely voluntary at all stages. Do not mislead them when asking for their co-operation.
- Take all reasonable precautions to ensure that research participants are in no way harmed or adversely affected as a direct result of their participation in a market research project.
- Do not unjustifiably criticise other recruiters.

ARTICLE 4: TRANSPARENCY

- Promptly identify yourself and unambiguously state the purpose of the research.
- Research participants should be able to check the identity and bona fides of the recruiter without difficulty.
- Recruiters should on request allow their client (and their client’s client) to arrange for checks on the quality of recruitment.
- Recruiters should provide their clients with appropriate technical details of any research project carried out for such clients.
- Recruiters should ensure that assignments are designed, carried out, reported and documented accurately, transparently and objectively.

ARTICLE 5: OWNERSHIP

- Recruitment proposals and cost quotations are the property of the organisation or individual who developed them unless otherwise agreed.

ARTICLE 6: RECORDING AND OBSERVATION TECHNIQUES

- Research participants should be informed before observation techniques or recording equipment are used for research purposes, except where these are openly used in a public place and no personal data are collected. If research participants so wish, the record or relevant section of it should be destroyed or deleted. In the absence of explicit consent research participants' personal identity should be protected.

ARTICLE 7: DATA PROTECTION AND PRIVACY

- Recruiters should have a privacy policy which is readily accessible to (potential) research participants.
- When collecting personal information from research participants, recruiters should ensure that research participants are aware of the purpose of the collection, and of any quality control activity involving re-contact.
- Personal information collected and held in accordance with this Code should be: collected for specified research purposes and not used in any manner incompatible with these purposes; adequate, relevant and not excessive in relation to the purpose of the research for which they are collected and/or further processed; and preserved no longer than is required for the purpose for which the information was collected or further processed.
- Recruiters should ensure that research participants' personal identity is withheld from the research user. The recruiter may communicate the research participant's identifiable personal information to the research user, unless national provisions require stricter regulations, under the following conditions:
  i) the research participant has explicitly expressed this wish and/or
  ii) the research participant has given their explicit consent and
  iii) on the understanding that no commercial activity will be directed at them as a direct result of their having provided information.
- Recruiters should ensure that adequate security measures are employed in order to prevent unauthorised access, manipulation to or disclosure of the personal data.
- If personal data are transferred to third parties, it should be established that they employ at least an equivalent level of security measures.
- Appropriate measures should be taken to ensure that research participants understand and can exercise their rights not to participate in a research project; to withdraw from the research interview at any time; to require that their personal data are not made available to others; and to delete or to rectify incorrect personal data which are held on them.
- Particular care should be taken to maintain the data protection rights of individuals when personal data are transferred from the country in which they are collected to another country. When data processing is conducted in another country, all reasonable steps should be taken to ensure that adequate security measures are observed and that the data protection principles of this Code are respected.

ARTICLE 8: CHILDREN AND YOUNG PEOPLE

- Recruiters should take special care when recruiting children and young people.
- The consent of the parent or responsible adult should first be obtained before recruiting children.

ARTICLE 9: SHARED INTERVIEWS

- Recruiters should inform their clients if the work to be carried out for them is to be combined or syndicated in the same project with work for other clients, without disclosing the identity of such clients without their permission.

ARTICLE 10: SUBCONTRACTING

- Recruiters should inform their clients, prior to work commencing, when any part of the work for them is to be subcontracted outside the recruiter's own organisation (including the use of any outside consultants). On request clients should be told the identity of any such subcontractor.

ARTICLE 11: PUBLISHING FINDINGS

- Not applicable

ARTICLE 12: RESPONSIBILITY

- Recruiters have overall responsibility for ensuring that recruitment is carried out in accordance with this Code, and for ensuring that clients and other parties to the research agree to comply with its requirements.

ARTICLE 13: EFFECT OF SUBSEQUENT REDRESS FOR CONTRAVENTION

- Subsequent correction and/or appropriate redress for a contravention of the Code, by the party responsible is desirable, but does not excuse the contravention.

ARTICLE 14: IMPLEMENTATION

- SAMRA has adopted the ESOMAR Code and the principles enshrined in it. The Code must be applied, by all organisations, companies and individuals involved in and at all stages in a research project.
- Marketers, researchers and their clients should be familiar with the Code and with other relevant local self-regulatory documents on research, and should familiarise themselves with decisions taken by SAMRA. Requests for interpretation of the principles contained in this Code can be submitted to SAMRA.
- See for the SAMRA Complaints Procedure.

4. COST STRUCTURE FOR RESEARCH PARTICIPANT RECRUITING

The items given below are not prescriptive. It is a guide for recruiters to build capacity to ensure that the recruitment process is understood in terms of the components that cost money and take time.

Item:	Face-to-face recruiting	Database, telephonic or email / referral recruiting
Field recruiter traveling costs (i.e. traveling to different areas to get a spread and representation of areas)	✓	×
Printing of questionnaires	✓	×
Executive time used to brief recruiters properly	✓	✓
Field recruiter fees (i.e. amount paid per correct recruit that attends the data collection event)	✓	×
Advertising costs, in order to continuously recruit fresh research participants (i.e. constantly advertise or network to keep getting new people onto the database)	×	✓
Telephone and email costs for briefings, back-checking, follow ups and client, research participants and fieldworker liaison	✓	✓ (Higher)
SMS costs for confirmations with research participants once confirmed and back checked	✓	✓ (Higher)
Administration time needed to manage projects and ensure that changes, updates etc. are communicated	✓	✓
Time used to compile attendance lists and capture questionnaires, and sending these to the client	✓	✓

Other typical expenditure items include:

- Rent
- Water, lights, utilities
- Telecommunications services (mobile phone and fixed line contracts and premiums; internet/3G)
- Website hosting
- Database management or administration services
- Accountant services
- Salaries, including overall management fees and time

Recruitment fees charged by a large recruiter may be different from those charged by a single recruiter who subcontracts. In the latter case, an additional management fee may apply. Recruiters should have a service level additional agreement with sub-contractors that is in line with the requirements that they have agreed to with their own client.