
**Market, opinion and social research,
including insights and data
analytics — Vocabulary and service
requirements**

*Études de marché, études sociales et d'opinion, y compris insights et
analytique de données — Vocabulaire et exigences de service*



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ISO copyright office
CP 401 • Ch. de Blandonnet 8
CH-1214 Vernier, Geneva
Phone: +41 22 749 01 11
Fax: +41 22 749 09 47
Email: copyright@iso.org
Website: www.iso.org

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Foreword

ISO (the International Organization for Standardization) is a worldwide federation of national standards bodies (ISO member bodies). The work of preparing International Standards is normally carried out through ISO technical committees. Each member body interested in a subject for which a technical committee has been established has the right to be represented on that committee. International organizations, governmental and non-governmental, in liaison with ISO, also take part in the work. ISO collaborates closely with the International Electrotechnical Commission (IEC) on all matters of electrotechnical standardization.

The procedures used to develop this document and those intended for its further maintenance are described in the ISO/IEC Directives, Part 1. In particular, the different approval criteria needed for the different types of ISO documents should be noted. This document was drafted in accordance with the editorial rules of the ISO/IEC Directives, Part 2 (see www.iso.org/directives).

Attention is drawn to the possibility that some of the elements of this document may be the subject of patent rights. ISO shall not be held responsible for identifying any or all such patent rights. Details of any patent rights identified during the development of the document will be in the Introduction and/or on the ISO list of patent declarations received (see www.iso.org/patents).

Any trade name used in this document is information given for the convenience of users and does not constitute an endorsement.

For an explanation of the voluntary nature of standards, the meaning of ISO specific terms and expressions related to conformity assessment, as well as information about ISO's adherence to the World Trade Organization (WTO) principles in the Technical Barriers to Trade (TBT) see www.iso.org/iso/foreword.html.

This document was prepared by Technical Committee ISO/TC 225, *Market, opinion and social research*.

This third edition cancels and replaces the second edition (ISO 20252:2012), which has been technically revised, and ISO 26362:2009 whose technical content has been included in this document. The main changes to the previous edition are as follows:

- the document has been completely restructured, with a core clause (Clause 4) applicable to all service providers, regardless of methodologies provided, and six separate annexes (Annexes A to F), each covering requirements relating to one of the globally-recognized research methodologies;
- Clause 3 has been updated;
- technical content has been updated to reflect new or modified research practices and new content has been added to Annex A and Annex D.

Any feedback or questions on this document should be directed to the user's national standards body. A complete listing of these bodies can be found at www.iso.org/members.html.

Introduction

The principal objective of international standardization within the market, opinion and social research (henceforth referred to as “research”) is the facilitation of global and consistent industry standards applicable to different national and regional markets. The intent of this document is to follow a structure to ensure that its implementation leads to continual improvement of research and to harmonize other national standards and industry codes already available.

With the emergence and general acceptance of online samples for market, opinion and social research, a primary source of online samples, online access panels, have evolved in their use and have been augmented with other online sample sources. ISO 26362:2009 has been withdrawn and incorporated into this document which now covers access panels, both online and offline.

The research business core framework is established and documented as [Clause 4](#) of this document. The normative annexes provide the specific framework for various globally recognized research methodologies. The service provider can align their practices to the requirements as stated within each annex in order to attest conformity to the particular research methodology or functions.

The intent is to apply the requirements specified in [Clause 4](#) as the mandatory framework for any attestation by a service provider conforming with this document, supported by at least one annex. The structure and scope of this document does not permit any attestation to this document without also meeting the requirements of at least one annex.

Regardless of whether a business undertakes research activities as an in-house or outsourced function, the service provider is ultimately responsible for ensuring that research activities meet the requirements of this document. Therefore, the scope and boundaries of the applicable disciplines need to be reflected in the statement of applicability (SoA), including the annexes with management processes in place to ensure the requirements of this document are met.

Any claim of attestation will state clearly and unambiguously which annexes conform with this document. The long-term aim is that businesses will attest the majority, if not all, of their research activities to this document.

Market, opinion and social research, including insights and data analytics — Vocabulary and service requirements

1 Scope

This document establishes terms, definitions and service requirements for service providers conducting market, opinion and social research, including insights and data analytics (hereinafter referred to as “service providers”).

Non-market research activities, such as direct marketing, are outside the scope of this document.

2 Normative references

There are no normative references in this document.

3 Terms and definitions

For the purposes of this document, the following terms and definitions apply.

ISO and IEC maintain terminological databases for use in standardization at the following addresses:

- ISO Online browsing platform: available at <https://www.iso.org/obp>
- IEC Electropedia: available at <http://www.electropedia.org/>

3.1

access panel

sample (3.86) database of potential *participants* (3.64) who declare that they will cooperate for future data collection if selected

Note 1 to entry: This does not include continuously reporting panels (e.g. TV-rating panels) or re-contact databases (asking for permission for follow-ups).

3.2

accuracy

degree of closeness between the estimate and the agreed parameter value

3.3

active panel member

panel member (3.61) who, within the last 12 months, has participated in at least one research study if requested, updated their profile data, or registered to join the *access panel* (3.1)

3.4

ad impression

display of an advertisement on a device

3.5

algorithm

process or set of rules to be followed in calculations or other problem solving operations

3.6

anonymize

remove, obscure, aggregate or alter identifiers with the aim of preventing the identification of individuals to whom data originally related

3.7
appraisal

process of monitoring the competency of an individual or group of individuals in carrying out their work

3.8
attestation

declaration of conformity by the *service provider* ([3.92](#)) related to the statement of applicability (SoA)

3.9
audit

systematic, independent and documented process for obtaining evidence and evaluating it objectively to determine the extent to which a standard's requirements are fulfilled

3.10
auditor

person with the competence to conduct an *audit* ([3.9](#))

3.11
automated coding

form of coding where manual coding is replaced, totally or in part, by various forms of computer coding or computer-assisted coding using computer-stored code lists, dictionaries, automated systems, machine learning, artificial intelligence or other technologies

3.12
bias

systematic deviation between the estimate and the agreed parameter value

3.13
bot

autonomous software that operates as an agent for a user or a program or simulates a human activity

3.14
client

individual, organization, department or division, whether it is internal or external, that requests or commissions a research project

3.15
code

character or combination of numeric, alphabetic or other types of characters associated with each response category

3.16
code frame

list of categories with associated *codes* ([3.15](#)) for classifying responses

3.17
completion rate

number of *participants* ([3.62](#)) who fully complete a research project divided by the number of participants who were invited to participate

3.18
computer-assisted interviewing
CAI

interviews where responses are keyed directly into a computer and where the administration of the interview is managed by a specifically designed program

EXAMPLE Computer-assisted personal interviewing (CAPI); computer-assisted telephone interviewing (CATI); computer-assisted self-interviewing (CASI); computer-assisted interviewing via web/internet (CAWI).

3.19**confidentiality**

requirement that information, materials and data collected are protected from unauthorized access

3.20**consent**

freely given agreements based on adequate information obtained prior to the collection/use of *participant* (3.62) data

3.21**cookie**

small piece of information (i.e. program code) that is stored on a browser for the purpose of identifying that browser during activities and between visits or sessions

3.22**dashboard**

software application with which a number of mini-applications can be reviewed or managed and reported

EXAMPLE Mini-applications could include app to export data or allow API access.

3.23**data cleaning**

process of identifying, correcting or removing unneeded or inaccurate data for research quality purposes

3.24**data collection instrument**

tool created for the purpose of gathering information from *participants* (3.62)

EXAMPLE Questionnaire, discussion guide, biometric device, webscraping technology, camera.

3.25**data editing**

set of methods for verifying the collected data and, if necessary, correcting the data

3.26**data entry**

process step where data collected are converted into computer-readable form or other types of standardized forms

Note 1 to entry: Simple data entry is data entry containing no built-in logic checks.

Note 2 to entry: Logic data entry is a data entry process that uses automated checks for the logic of data on elements such as data types, filters, question skips and response options.

3.27**data processing**

management and converting of data from their raw state through to a required output

3.28**data record**

set of data derived from a reporting or observed unit

3.29**de-duplication**

process to remove *data records* (3.28) corresponding to a *participant* (3.62) or *record* (3.76) that appears more than once in a research dataset or *access panel* (3.1)