

---

---

**Market, opinion and social research —  
Vocabulary and service requirements**

*Études de marché, études sociales et d'opinion — Vocabulaire et  
exigences de service*

**iTeh STANDARD PREVIEW**  
**(standards.iteh.ai)**

ISO 20252:2012

<https://standards.iteh.ai/catalog/standards/sist/cf3d7181-a1e5-4d2b-a0f6-5f540a59ee71/iso-20252-2012>



## iTeh STANDARD PREVIEW (standards.iteh.ai)

ISO 20252:2012

<https://standards.iteh.ai/catalog/standards/sist/cf3d7181-a1e5-4d2b-a0f6-5f540a59ee71/iso-20252-2012>



### **COPYRIGHT PROTECTED DOCUMENT**

© ISO 2012

All rights reserved. Unless otherwise specified, no part of this publication may be reproduced or utilized in any form or by any means, electronic or mechanical, including photocopying and microfilm, without permission in writing from either ISO at the address below or ISO's member body in the country of the requester.

ISO copyright office  
Case postale 56 • CH-1211 Geneva 20  
Tel. + 41 22 749 01 11  
Fax + 41 22 749 09 47  
E-mail [copyright@iso.org](mailto:copyright@iso.org)  
Web [www.iso.org](http://www.iso.org)

Published in Switzerland

# Contents

Page

Foreword .....	iv
Introduction .....	v
1 Scope .....	1
2 Terms and definitions .....	1
3 Research process management system requirements .....	7
3.1 Organization and responsibilities .....	7
3.2 Confidentiality of research .....	7
3.3 Documentation requirements .....	8
3.4 Competence and training .....	8
3.5 Subcontracting/outsourcing .....	8
3.6 Reviewing the effectiveness of the research process management system .....	9
4 Managing the executive elements of research .....	10
4.1 Responding to research requests .....	10
4.2 Project schedule .....	12
4.3 Assistance by and cooperation with clients .....	13
4.4 Questionnaires and discussion guides .....	14
4.5 Managing sampling and data processing .....	15
4.6 Monitoring the execution of research .....	16
4.7 Research documents, materials and products .....	17
4.8 Reporting of research results .....	17
4.9 Research records .....	18
5 Data collection .....	20
5.1 General .....	20
5.2 Management, recruitment and training of fieldworkers .....	20
5.3 Conducting data collection by fieldwork .....	22
5.4 Fieldworker validation of quantitative research .....	24
5.5 Qualitative data collection .....	25
5.6 Self-completion data collection .....	27
5.7 Observational data collection .....	29
5.8 Data collection from secondary sources .....	30
5.9 Data collection records .....	31
6 Data management and processing .....	31
6.1 General .....	31
6.2 Hard copy data entry .....	31
6.3 Accuracy of databases not requiring manual data entry .....	32
6.4 Coding .....	32
6.5 Data editing .....	34
6.6 Data file management .....	34
6.7 Data analysis .....	34
6.8 Electronic data delivery .....	35
6.9 Back up, retention and security of data .....	36
7 Report on research projects .....	36
7.1 General .....	36
7.2 Quantitative research .....	36
7.3 Qualitative research .....	37
7.4 Observational research .....	38
Bibliography .....	39

## 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.

International Standards are drafted in accordance with the rules given in the ISO/IEC Directives, Part 2.

The main task of technical committees is to prepare International Standards. Draft International Standards adopted by the technical committees are circulated to the member bodies for voting. Publication as an International Standard requires approval by at least 75 % of the member bodies casting a vote.

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.

ISO 20252 was prepared by Technical Committee ISO/TC 225, *Market, opinion and social research*.

This second edition cancels and replaces the first edition (ISO 20252:2006), which has been technically revised.

## iTeh STANDARD PREVIEW (standards.iteh.ai)

[ISO 20252:2012](https://standards.iteh.ai/catalog/standards/sist/cf3d7181-a1e5-4d2b-a0f6-5f540a59ee71/iso-20252-2012)

<https://standards.iteh.ai/catalog/standards/sist/cf3d7181-a1e5-4d2b-a0f6-5f540a59ee71/iso-20252-2012>

## Introduction

The principal objective of international standardization is to facilitate business development and growth, particularly between different national and regional markets. The intention of this International Standard is to follow a linear structure to ensure that its implementation leads to continual improvement of market, opinion and social research and to harmonize other national standards already available.

Market, opinion and social research is now a global industry. An increasing proportion of the expenditure of users of the industry is allocated to multi-national projects, whose objective is consistent regional and global measurement. An International Standard facilitates the achievement of this important economic and social objective by ensuring that the process elements of such research are undertaken to an appropriate standard and in a verifiable and consistent manner. This enables data arising from research studies carried out in accordance with this International Standard to be used to guide the provision of goods and services to citizens and institutions in a consistent and transparent fashion.

Subsidiary objectives in developing this International Standard include the need to define the level of requirement for service provision and common work procedures to be applied in processes, including across different countries. Requirements only apply when services are provided.

This International Standard contains extensive terms and definitions.

## iTeh STANDARD PREVIEW (standards.iteh.ai)

[ISO 20252:2012](https://standards.iteh.ai/catalog/standards/sist/cf3d7181-a1e5-4d2b-a0f6-5f540a59ee71/iso-20252-2012)

<https://standards.iteh.ai/catalog/standards/sist/cf3d7181-a1e5-4d2b-a0f6-5f540a59ee71/iso-20252-2012>

**iTeh STANDARD PREVIEW**  
**(standards.iteh.ai)**

ISO 20252:2012

<https://standards.iteh.ai/catalog/standards/sist/cf3d7181-a1e5-4d2b-a0f6-5f540a59ee71/iso-20252-2012>

# Market, opinion and social research — Vocabulary and service requirements

## 1 Scope

This International Standard establishes terms and definitions and service requirements for organizations and professionals conducting market, opinion and social research.

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

## 2 Terms and definitions

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

### 2.1

#### **access panel**

sample **database** (2.16) of potential **respondents** (2.56) who declare that they will cooperate for future data collection if selected

NOTE This does not include continuously reporting panels (e.g. TV-rating panels) and re-contact databases (asking for permission for follow-ups).

### 2.2

#### **accuracy**

degree of closeness between the estimate and the true parameter value

### 2.3

#### **ad hoc**

<research> specifically designed to address a particular objective or issue

### 2.4

#### **appraisal**

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

### 2.5

#### **audit**

systematic, independent and documented process for obtaining evidence and evaluating it objectively to determine the extent to which **audit criteria** (2.6) are fulfilled

### 2.6

#### **audit criteria**

set of policies, procedures or requirements used as a reference

### 2.7

#### **auditor**

person with the competence to conduct an **audit** (2.5)

### 2.8

#### **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 and dictionaries

### 2.9

#### **bias**

systematic deviation between the estimate and the true parameter value

**2.10  
client**

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

**2.11  
code**

numeric or alpha character or combination of characters associated with each response category

**2.12  
code frame**

list of categories with associated **codes** (2.11) for classifying responses

**2.13  
computer-assisted interviewing  
CAI**

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

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

**2.14  
confidentiality**

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

**2.15  
continuous research**

research that involves regular and on-going data collection

**2.16  
database**

centrally held collection of data that is accessible to users

**2.17  
data editing**

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

**2.18  
data entry**

process step where data collected are converted into computer-readable form

**2.19  
data processing**

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

**2.20  
data record**

set of data derived from a reporting or observed unit

**2.21  
depth interview**

unstructured interview conducted to understand the underlying motivations, beliefs, attitudes and feelings on a particular subject

NOTE Discussion can vary from interview to interview, as long as all topics in a pre-defined **discussion guide** (2.23) are covered.

**2.22  
derived data item**

data item used in analysis and/or tables derived from one or more source data items and/or categories

iTeh STANDARD PREVIEW  
(standards.iteh.ai)

ISO 20252:2012  
<https://standards.iteh.ai/catalog/standards/sist/cf3d7181-a1e5-4d2b-a0f6-5f540a59ee71/iso-20252-2012>



**2.23****discussion guide**

list of points or subjects which are to be covered in a **depth interview** (2.21) or **focus group** (2.28)

**2.24****document**

procedure, information or data which can be changed or modified

NOTE For example, a questionnaire is a document, but once it is completed by a **respondent** (2.56) or an interviewer, it becomes a **record** (2.51).

**2.25****ethnographic observation**

**qualitative research** (2.47) method in which the researcher observes and/or interacts with research subjects in their natural setting as they go about normal activities

NOTE The researcher can limit participation to observation, with limited or no questioning of the subjects, or can join in as an active member of the community being observed.

**2.26****fieldworker**

person involved in the collection of data for market, opinion and social research, excluding management and research staff.

NOTE Fieldworkers include, but are not limited to, face-to-face and telephone interviewers, recruiters for qualitative or other research, “mystery shoppers” (see 2.36) and others carrying out data collection by observation, and **auditors** (2.7) collecting data from retail outlets.

**2.27****filter**

question or instruction in a questionnaire that restricts answers to a subgroup of **respondents** (2.56)

**2.28****focus group****group discussion**

open discussion with a small number of selected participants conducted by a **moderator** (2.35)

NOTE Focus groups can be conducted face-to-face, by telephone, online or by a combination of these. Online focus groups can be synchronous or real-time (e.g. chat sessions), or asynchronous over an extended period of time (e.g. message and/ or bulletin boards).

**2.29****frequency count****hole count****marginals**

summary count of individual data items on a computer file

**2.30****imputation**

procedure where missing data are replaced by estimated or modelled data

**2.31****incentive**

gift, payment or other considerations offered to potential **respondents** (2.56) to increase respondent cooperation

**2.32****indexing**

numerical scale used to compare variables with one another or with a reference number

**2.33****intercept**

type of interviewing where **respondents** (2.56) are approached, either in person or online

**2.34**

**logic data entry**

**data entry** (2.18) processes which are programmed to check question skips and response ranges

**2.35**

**moderator**

individual responsible for facilitating the interaction of members of a **focus group** (2.28)

**2.36**

**mystery shopping**

study using **fieldworkers** (2.26) in the role of customers/users in order to evaluate a business/service performance

**2.37**

**netting**

method of treating **codes** (2.11) assigned to multiple-response questions, which can include open-ended codes, where the net refers to the total number of people responding with the same group of codes, even when each person has given more than one response within the same group of codes

**2.38**

**non-response**

failure to obtain measurements on some **sample** (2.58) or census members for all or some questions or variables

**2.39**

**observational data collection**

**observational research**

collection of data by observation of the behaviour, habits, activities, relations, expressed opinions or performance of individuals or groups, as well as phenomena, including the use of passive techniques, without the use of direct questioning

**2.40**

**omnibus survey**

**survey** (2.65) and questionnaire covering data required for more than one project and/or **client** (2.10)

**2.41**

**open-ended question**

**open-ended response**

type of question where **respondents** (2.56) are asked to answer in their own words

**2.42**

**participation rate**

number of **respondents** (2.56) providing a usable response divided by the total number of initial personal invitations requesting members to participate

**2.43**

**penetration level**

proportion of potential **respondents** (2.56) or contacts who qualify to participate in a **survey** (2.65)

**2.44**

**pre-testing**

<questionnaires> small-scale tests to check the performance of a questionnaire before embarking on full-scale fieldwork

**2.45**

**primary record**

raw data in electronic format or hard copy, including unedited completed questionnaires, recordings of **qualitative research** (2.47) and other similar items

**2.46**  
**probability sampling**  
**random sampling**

procedure such that each member of a **sampling frame** (2.59) has a non-zero probability of being included in the **sample** (2.58)

NOTE For probability sampling, statistical margins of error apply.

**2.47**  
**qualitative research**

analysis of motivations, patterns of thought, opinion, attitude, assessment or behaviour, via research techniques such as **focus groups** (2.28) and **depth interviews** (2.21) and qualitative **ethnographic observation** (2.25)

NOTE A statement about the frequency and distribution of such patterns within a given population is not possible on the basis of qualitative study.

**2.48**  
**quantitative research**

numerical representation of observations for the purpose of describing and explaining phenomena that those observations reflect

NOTE This research often aims at making inference to populations. In most cases, a structured questionnaire is used with predetermined questions where most of the responses are precoded.

**2.49**  
**questionnaire**

structured or partly structured tool or instrument, for collecting data, consisting of a series of questions

NOTE Questionnaires can be self-completion or administered by an interviewer.

**2.50**  
**quota sampling**

method of constructing a **sample** (2.58) so that it conforms to a predefined structure with respect to certain variables

**2.51**  
**record**

special type of **document** (2.24) that provides historical evidence of an event, activity or fact

**2.52**  
**recruiter**

person who identifies and invites potential **respondents** (2.56) to participate in a research project

**2.53**  
**research process management**

procedures and measures focused on fulfilling quality control and quality assurance requirements

**2.54**  
**research proposal**

written submission to a **client** (2.10) which includes a research design

**2.55**  
**research service provider**

organization that conducts research projects or parts of research projects in market, opinion and social research

EXAMPLES Private research institutions; academic and university research institutions; in-company research departments; local authorities, official statistics agencies or individual researchers acting in the same capacity.

**2.56**  
**respondent**

person from whom data are collected

NOTE The respondent can be a natural or legal person.

**2.57**

**retail audit**

collection of data from retail outlets using documentary (e.g. paper or digital) and/or observational methods

**2.58**

**sample**

subset of the **target population** (2.66) from which data are to be collected

**2.59**

**sampling frame**

list of population elements or other appropriate sources from which a **sample** (2.58) is to be drawn

**2.60**

**screening**

initial questions in a questionnaire used to establish eligibility of **respondents** (2.56)

**2.61**

**secondary data**

**desk research**

data that have already been collected and are available from another source

**2.62**

**simple data entry**

**data entry** (2.18) containing no built-in logic checks

**2.63**

**social media**

online technologies and practices that people use to share opinions, insights, experiences and perspectives with each other, transforming traditional one-to-many interactions into many-to-many interactions

**2.64**

**subcontracting**

**outsourcing**

passing responsibility for executing an element of the research project to a third-party **research service provider** (2.55)

iTeh STANDARD PREVIEW

Standards.Iteh.ai

ISO 20252:2012

<https://standards.itih.ai/catalog/standards/sist/cf3d7181-a1e5-4d2b-a0f6-5f540a59ee71/iso-20252-2012>

NOTE Self-employed individual **fieldworkers** (2.26) are not defined as subcontractors for the purposes of this International Standard.

**2.65**

**survey**

systematic data collection from a **sample** (2.58) of a **target population** (2.66) from which inferences can be made

**2.66**

**target population**

population of interest in the research project to which inferences are to be made

**2.67**

**validation**

procedures to check conformity to specification or requirement

**2.68**

**wave**

successive repetition in a continuous project in which neither the objective nor the general project design change

**2.69**

**weighting**

calculation process in which different units or subgroups are recalculated by assigning numerical values, as necessary, to correct and/or improve the representativeness of **sample** (2.58) estimates

NOTE Weighting can be used to adjust for unequal selection probabilities, such as multistage sampling, coverage **bias** (2.9) and **non-response** (2.38) bias.

### 3 Research process management system requirements

#### 3.1 Organization and responsibilities

##### 3.1.1 The research process management system

The research service provider shall apply a research process management system which covers all the requirements of this International Standard, including the scope of the system in relation to the research service provider's business.

The research process management system shall be a documented system that can differ from one organization to another due to the following:

- the size of the organization and type of activities;
- complexity of and risks associated with processes and their interactions;
- the competence of personnel.

Procedures, instructions and methods required for completing the different tasks in accordance with the requirements of this International Standard shall be documented, implemented, monitored, maintained and auditable.

Documents may address the requirements for one or more procedures. A requirement for a documented procedure may be covered by more than one document. The documentation can be in any form or type of media.

##### 3.1.2 Senior management responsibilities

Senior management of the research service provider shall take responsibility for the following:

- committing to quality of client service (including a statement of quality policy) appropriate to the purpose of the organization;
- documenting the organizational structure of the research service provider, including the responsibilities of the people involved in the delivery of the service;
- reviewing and improving the research process management system;
- ensuring the provision of adequate and appropriate resources and information for the system, including the appointment of a quality manager;
- ensuring that everyone involved in the provision of the research service is familiar with the applicable national and international ethical and professional codes, requirements of relevant legislation and documented procedures and methods which specifically affect their work.

##### 3.1.3 Appointment of a quality manager

A quality manager shall be appointed who has enough authority to be responsible for the administration of the whole research process management system and who is responsible for organizing internal audits in order to ensure that this International Standard is applied.

NOTE In some circumstances, the quality manager could be a part-time role, and in other circumstances, it could be more effective to appoint more than one quality manager (i.e. share the role).

#### 3.2 Confidentiality of research

All information supplied to the research service provider by the client in order to conduct a research project shall be treated in the strictest confidence. It shall only be used in this context and shall not be made available to third parties without the client's authorization. Confidential information shall be stored securely (see also 4.9.3).