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**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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## 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](http://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](http://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](http://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](http://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.

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# 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)

### 3.30

#### **depth interview**

in-depth interview (IDI)

semi-structured or unstructured interview conducted to understand the underlying motivations, beliefs, attitudes behaviours and feelings of a *participant* ([3.62](#))

### 3.31

#### **derived data item**

data item calculated or recoded from one or more sources and/or categories

### 3.32

#### **device ID**

device identification

machine ID

distinctive alphanumeric string associated with a computer, smartphone, tablet or other computing device

Note 1 to entry: A device can have multiple device IDs for a different purpose. These include device IDs to enable Wi-Fi or Bluetooth or identify a device on a mobile carrier network. Other device IDs, such as Apple's UDID or Android's Android ID, are used by apps, developers and other companies to identify, track and analyse devices and their users for a number of purposes, including online advertising.

Note 2 to entry: For a PC or laptop computer the MAC (Media Access Control) address can be used as a device ID.

Note 3 to entry: A device ID can be personally identifiable.

### 3.33

#### **digital analytics**

analysing and reporting of electronic data for the purpose of measuring and understanding people and their behaviour

### 3.34

#### **digital device**

##### **mobile device**

electronic device intended to be portable which can collect data, either directly or indirectly, that can be uploaded to a *third party* ([3.101](#)) either immediately or upon synchronization with appropriate software

Note 1 to entry: Digital devices include smartphones, smart watches, fitness or health tracking devices, tablets, geo-location devices and biometric data gathering devices.

### 3.35

#### **digital fingerprint**

device fingerprint

machine fingerprint

browser fingerprint

information collected about a computer, tablet, smartphone or other computing device for the purpose of identification of individual research participants or devices

Note 1 to entry: Digital fingerprints are typically created using web browser configuration parameters along with other device parameters that can be obtained from a device. These parameters are used to create a single string that comprises the digital fingerprint.

Note 2 to entry: A digital fingerprint may be personally identifiable.

### 3.36

#### **discussion guide**

list of points or topics which are to be covered in a *depth interview* ([3.30](#)), *focus group* ([3.42](#)) or other qualitative method

### 3.37

#### **dongle**

small piece of hardware, often a USB device, that can be connected to other electronic equipment, to enable additional services such as access to the internet

**3.38****duplication**

situation where a *participant* (3.62) is invited or attempts to complete more than one response for a specified research project

**3.39****exclusion request**

excluding a potential *participant* (3.62) from a research project based on their participation in a research project involving the same or similar product/service category and/or methodology

**3.40****fieldworker**

interviewer

person involved in the collection of data for market, opinion and social research

Note 1 to entry: Fieldworkers include, but are not limited to, face-to-face and telephone interviewers, recruiters for qualitative or other research, “mystery shoppers” (3.54) and other people carrying out data collection by observation, and persons collecting data from retail outlets, following instructions from the *service provider* (3.92).

**3.41****filter**

question or instruction in a data collection instrument that restricts answers to a subgroup of *participants* (3.62)

**3.42****focus group****group discussion**

open discussion with a small number of selected *participants* (3.62) conducted by a *moderator* (3.53)

Note 1 to entry: 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).

**3.43****fraudulent participant**

*participant* (3.62) or *panel member* (3.61) who deliberately misrepresents their identity, profile data or responses

**3.44****frequency count**

hole count

marginals

summary count of individual data items on a computer file

**3.45****imputation**

procedure where missing data are replaced by estimated or modelled data

**3.46****inattentive participant**

inattentive panel member

*panel member* (3.61) or *participant* (3.62) who does not give an adequate level of thought to the responses they provide

Note 1 to entry: A poor quality of response is not necessarily the *panel member's* (3.61) or *participant's* (3.62) fault, and could reflect poor data collection instrument design.

**3.47****incentive**

gift, payment or other considerations offered to potential *participants* (3.62) to increase participant cooperation

**3.48**

**indexing**

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

**3.49**

**information security**

preservation of confidentiality, integrity and availability of information

**3.50**

**intercept**

type of interviewing where *participants* (3.62) are approached, without prior consent, either in person or online

**3.51**

**internal audit**

periodic checks carried out by a company's own trained employees as to whether projects within the company have been carried out in accordance with the described procedures

**3.52**

**machine learning**

computer technology with the ability to automatically learn and improve from experience without being explicitly programmed

EXAMPLE Speech recognition, predictive text, spam detection, artificial intelligence.

**3.53**

**moderator**

individual responsible for facilitating the interactions among *participants* (3.62) of a *focus group* (3.42) or other qualitative forum

**3.54**

**mystery shopping**

study using *fieldworkers* (3.40), researchers or *participants* (3.62) (consumers or general public) in the role of customers/users in order to evaluate a business/service performance

**3.55**

**near field communication**

NFC  
wireless technology that enables communication between devices over a short distance

**3.56**

**netting**

method of treating *codes* (3.15) assigned to multiple-response questions, which can include open-ended codes, where the net refers to the total number of *participants* (3.62) responding with the same group of codes, even when each participant has given more than one response within the same group of codes

**3.57**

**non-response**

absence of measurements on some *sample* (3.86) or census members for all or some questions or variables

**3.58**

**observational data collection**

**observational research**

**observational methodologies**

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

Note 1 to entry: See also *passive data collection* (3.64) and *physical observational data collection* (3.66).

**3.59****open-ended question****open-ended response**

type of question where *participants* (3.62) are asked to answer in their own words

**3.60****opt out**

explicit request to terminate participation in a research activity

**3.61****panel member**

individual recruited from a documented source who has provided profile data and appropriate information for validation of identity, given explicit consent to participate in research according to the terms and conditions of panel membership, and not opted out

**3.62****participant**

respondent

data subject

person or organisation from whom or about whom data are collected for research

**3.63****participation rate**

start rate

number of *participants* (3.62) providing a usable response divided by the total number of initial personal invitations requesting members to participate

**3.64****passive data collection****passive methodologies**

process of data collection that avoids or minimizes active interaction with the *participant* (3.62)

**3.65****personal data**

information relating to a natural living person that can be used to identify an individual

Note 1 to entry: The identification can be made for example by reference to direct identifiers (e.g. name, specific geographic location, telephone number, picture, sound, video recording or biometric data) or indirectly by reference to an individual's physical, physiological, mental, economic, cultural or social characteristics.

**3.66****physical observational data collection****physical observational research**

collection of data through observation, whether in person or by video, including behaviour, habits, activities, relations, expressed opinions or performance of individuals or groups without the use of direct questioning and undertaken in the physical environment

Note 1 to entry: Physical observational data collection excludes online observation, such as digital behaviour.

**3.67****prescreening**

initial questions in a *data collection instrument* (3.24) used to establish eligibility of *participants* (3.62)

**3.68****pretest**

small-scale test to check the performance of a *data collection instrument* (3.24) or methodology before embarking on full-scale fieldwork

**3.69**

**primary record**

data collected directly from the source and in their original state

Note 1 to entry: This can include *survey* (3.98) data, interview transcripts, field notes, biometric measurements and recordings.

**3.70**

**probability sample**

random *sample* (3.86) from a population wherein each member has a known and non-zero probability of being included and allows for the calculation of margin of error

EXAMPLE Simple random sampling (SRS); stratified sampling; cluster sampling; systematic sampling; and multistage sampling (in which some of the methods above are combined in stages).

**3.71**

**profile data**

descriptive characteristics of a *panel member* (3.61)

**3.72**

**qualitative research**

analysis of motivations, patterns of thought, opinion, attitude, assessment or behaviour, via research techniques such as *focus groups* (3.42), *depth interviews* (3.30), discourse content analysis and qualitative *observational research* (3.58)

**3.73**

**quantitative research**

numerical measurement of observations via research techniques such as *questionnaires* (3.74), opinion polls, *surveys* (3.98) and experimental research

**3.74**

**questionnaire**

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

Note 1 to entry: Questionnaires can be self-completion or administered by a *fieldworker* (3.40).

**3.75**

**quota sample**

*sample* (3.86) drawn using a non-probabilistic method such that it conforms to a predefined structure with respect to certain variables

Note 1 to entry: These types of samples do not allow for a margin of error to be calculated.

Note 2 to entry: Examples of non-probability samples include convenience samples, accidental samples and river samples.

**3.76**

**record**

special type of document that provides historical evidence of an event, activity or fact

Note 1 to entry: For example, a *questionnaire* (3.74) is a document, but once it is completed by a *participant* (3.64) or a fieldworker, it becomes a record.

Note 2 to entry: Records can be physical or digital.

**3.77**

**recruiter**

person who identifies and invites potential *participants* (3.62) to take part in a research project