



**International
Standard**

ISO 20252

**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*

**Fourth edition
2026-09**

Sample Document

get full document from standards.iteh.ai

Sample Document

get full document from standards.iteh.ai



COPYRIGHT PROTECTED DOCUMENT

© ISO 2026

All rights reserved. Unless otherwise specified, or required in the context of its implementation, no part of this publication may be reproduced or utilized otherwise in any form or by any means, electronic or mechanical, including photocopying, or posting on the internet or an intranet, without prior written permission. Permission can be requested from either ISO at the address below or ISO's member body in the country of the requester.

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

Published in Switzerland

Contents

Page

Foreword	iv
Introduction	v
1 Scope	1
2 Normative references	1
3 Terms and definitions	1
4 Core requirements for market, opinion and social research, insight and data analytics	14
4.1 Core framework and legal requirements	14
4.1.1 Statement of applicability	14
4.1.2 Legal and other requirements	16
4.1.3 Confidentiality of research	16
4.1.4 Documentation and records management	18
4.1.5 Development and use of AI and related technologies	19
4.2 Personnel and infrastructure responsibilities	21
4.2.1 Organizational obligations	21
4.2.2 Personnel development and management	21
4.3 Information security	22
4.3.1 Information security risk assessment	22
4.3.2 Information handling and data security controls	22
4.3.3 Information security incident reporting	22
4.3.4 Information security training and awareness	23
4.4 Subcontracting services	23
4.4.1 General	23
4.4.2 Subcontracted project work	23
4.5 Planning, delivery and reporting on projects and research work	24
4.5.1 General	24
4.5.2 Client relationship management	24
4.5.3 Proposals, quotations or other responses to a request for services	25
4.5.4 Providing deliverables to the client	28
4.6 Senior management review and improvement	30
4.6.1 Input	30
4.6.2 Output	30
4.7 Internal audits	31
Annex A (normative) Sampling	32
Annex B (normative) Fieldwork	40
Annex C (normative) Physical observation	49
Annex D (normative) Digital and online observation	51
Annex E (normative) Self completion	56
Annex F (normative) Data management and processing	60
Annex G (normative) Panel development and life cycle management	67
Bibliography	77

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 document 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).

ISO draws attention to the possibility that the implementation of this document may involve the use of (a) patent(s). ISO takes no position concerning the evidence, validity or applicability of any claimed patent rights in respect thereof. As of the date of publication of this document, ISO had not received notice of (a) patent(s) which may be required to implement this document. However, implementers are cautioned that this may not represent the latest information, which may be obtained from the patent database available at www.iso.org/patents. ISO shall not be held responsible for identifying any or all such patent rights.

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 fourth edition cancels and replaces the third edition (ISO 20252:2019), which has been technically revised, and ISO 19731:2017 whose technical content has been included in this document.

The main changes are as follows:

- the document has been reviewed to reflect the increasing use of automated techniques and artificial intelligence (AI) and related technologies, and where appropriate, requirements have been amended for the use of such techniques;
- the inclusion of AI and related technologies has significantly changed the requirements for some of the core requirements and annexes (e.g. translation, coding, analysis);
- [Clause 4](#) has been reviewed, and where appropriate, the terminology and requirements have been aligned with other International Standards (e.g. ISO/IEC 27001);
- terms and definitions included in [Clause 3](#) have been updated;
- [Annex A](#) has been split into two annexes, with sampling requirements remaining in [Annex A](#) and panel management requirements moving into a new [Annex G](#);
- [Annex A](#) has been modified to strengthen data quality requirements, some of which have also been mirrored in [Annex G](#);
- technical content has been updated to reflect new or modified research practices, and new content has been added to all of the annexes.

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.

The increasing use of automated processes and AI and related technologies in market, opinion and social research has been reflected in this document in a technology neutral manner to reflect the fast-changing nature of these techniques. The addition of automation and AI and related technologies has resulted in some significant changes in some parts of the core framework, notably translation and coding.

The research business core framework remains and is documented as [Clause 4](#). [Clause 4](#) has been re-ordered and aligned with other standards (such as ISO/IEC 27001) which are complementary to this document. The language used in this document has been aligned with such standards to increase accessibility and familiarity.

[Annexes A](#) to [G](#) provide the specific framework for various globally recognized research methodologies. The service provider can align its practices to the requirements as stated within each annex in order to attest conformity to the particular research methodology or functions. The annexes have been expanded with the addition of a new [Annex G](#), panel development and life cycle management, the content of which was previously included in [Annex A](#). In addition, [Annex A](#) has been strengthened with the addition of new data quality requirements to reflect the increasing challenges in this area.

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 do 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 subcontracted 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 are 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 clearly and unambiguously state which annexes are included within the scope of conformity. The long-term aim is that businesses will attest the majority, if not all, of their research activities to this document.

Sample Document

get full document from standards.iteh.ai

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.

This document does not apply to non-research activities, such as direct marketing.

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 terminology databases for use in standardization at the following addresses:

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

3.1 accuracy

degree of closeness between the estimate and the *agreed parameter value* (3.5)

3.2 active panel member

panel member (3.79) who, within the last 12 months, has participated in at least one research project if requested, updated their *profile data* (3.87), or registered to join the *panel* (3.78)

3.3 affiliate networks

aggregated individual affiliates and publishers in partnership relationships where potential *participants* (3.80) are members of communities and are offered opportunities to participate in research

3.4 aggregator

supplier that facilitates access to *participants* (3.80) sourced from multiple online sources (e.g. *panels* (3.78)) and making them accessible via a single interface

3.5 agreed parameter value

degree of closeness between an estimate and the true value

3.6 algorithm

set of rules for transforming the logical representation of data

[SOURCE: ISO/IEC 18836:2001, 4.2]

3.7

anonymize

to remove, obscure, aggregate, or alter identifiers in such a way that individuals to whom the data originally related can no longer be identified, either directly or indirectly

3.8

appraisal

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

3.9

artificial intelligence

AI

set of technologies that are designed to simulate human intelligence and to provide problem-solving capabilities

3.10

artificial intelligence agent

AI agent

automated entity that uses *AI* (3.9) to perform tasks, interact with its environment, and take actions to achieve specific goals often by interacting with users, data or other systems

3.11

asset

any resource owned by an organization that has potential or actual economic value

EXAMPLE Files, images, concepts.

3.12

attestation

declaration of conformity by the *service provider* (3.120) related to the statement of applicability (SoA)

3.13

audit

systematic, independent and documented process for obtaining evidence and evaluating it objectively to determine the extent to which organizations or *service providers* (3.120) conform to the requirements of this document

3.14

auditor

person with the competence to conduct an *audit* (3.13)

3.15

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* (3.20) lists, dictionaries, automated systems, machine learning, *artificial intelligence* (3.9) or other technologies

3.16

bias

systematic deviation between the estimate and the *agreed parameter value* (3.5)

3.17

bot

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

3.18

business governance

rules and protocols put in place to address specific standards and requirements of stakeholders and interested parties when providing services

3.19

client

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

3.20

code

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

3.21

code frame

list of categories with associated *codes* (3.20) for classifying responses

3.22

competent

possessing the necessary knowledge, skill and/or experience to perform certain tasks effectively and in accordance with applicable requirements

3.23

completion rate

number of *participants* (3.80) who fully complete a research project divided by the number of participants who were invited to participate

3.24

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).

3.25

confidentiality

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

3.26

consent

freely given agreements based on adequate information obtained prior to the collection/use of *participant* (3.80) data

3.27

convenience sample

sample (3.105) chosen on the basis of accessibility, expediency, cost, efficiency, or other reason not directly concerned with statistical sampling design

[SOURCE: ISO 11074:2025, 3.97, modified — “statistical sampling design” replaced “sampling parameters”. Note 1 to entry deleted.]

3.28

cookie

small piece of information (i.e. program *code* (3.20) that is stored on a browser for the purpose of identifying that browser during activities and between visits or sessions

3.29

corrective action

action or actions to eliminate the cause or causes of a nonconformity and to prevent recurrence

3.30

dashboard

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

EXAMPLE Mini applications can include an app to export data or allow API access.

3.31

data cleaning

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

3.32

data collection instrument

tool created for the purpose of gathering information from *participants* ([3.80](#))

EXAMPLE *Questionnaire* ([3.92](#)), *discussion guide* ([3.46](#)), biometric device, web scraping technology, camera.

3.33

data editing

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

3.34

data entry

process step where data collected are converted into a 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* ([3.50](#)), question skips and response options.

3.35

data processing

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

3.36

data quality

characteristics of data that relate to their ability to satisfy stated requirements

[SOURCE: ISO 14044:2006, 3.19]

3.37

data record

results from the performance of a research project using *project-related documents* ([3.88](#)), including *primary records* ([3.85](#))

3.38

de-duplication

process to remove *data records* ([3.37](#)) corresponding to *participants* ([3.80](#)) or *records* ([3.94](#)) that appear more than once in a research data set or *panel* ([3.78](#))

3.39

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* ([3.80](#))

3.40

derived data item

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

3.41

device ID

unique 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 or operating systems IDs to enable Wi-Fi¹⁾ or *near field communications* (3.70) or uniquely identify a device on a mobile carrier network. Other unique device IDs (such as an *International Mobile Equipment Identity (IMEI)* (3.55)), are also 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 personal computer (PC) or laptop computer, the media access control (MAC) address can be used as a device ID.

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

3.42

digital analytics

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

3.43

digital and online observation

collection of data through observation of digital activity including behaviour, habits, activities, relations, expressed opinions or performance of individuals or groups without the use of direct questioning and undertaken in the digital and online environment

Note 1 to entry: Digital *observational data collection* (3.74) excludes *physical observation* (3.84).

3.44

digital device

portable electronic device that can collect data, either directly or indirectly, and share it with a *third party* (3.131)

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

3.45

digital fingerprint

information collected about a computer, tablet, smartphone or other computing device for the purpose of identification of individual research *participants* (3.80) 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.

3.46

discussion guide

list of points or topics which are to be covered in a *depth interview* (3.39), *focus group* (3.51) or other *qualitative research* (3.90) method

3.47

dongle

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

1) Wi-Fi® is a registered trademark of Wi-Fi Alliance®, and is an example of a suitable product(s) available commercially. This information is given for the convenience of users of this document and does not constitute an endorsement by ISO of this product.

3.48

drop-out

abandon

abandonment

instances where *participants* (3.80) start and do not finish a research project

3.49

fieldworker

interviewer

person involved in the collection of research data

Note 1 to entry: Fieldworkers include, but are not limited to, face-to-face and telephone interviewers, *recruiters* (3.95) for *qualitative research* (3.90) or other research, *mystery shoppers* (3.68) and other people carrying out data collection by observation, and persons collecting data from retail outlets, following instructions from the *service provider* (3.120).

3.50

filter

question or instruction in a *data collection instrument* (3.32) that restricts answers to a subgroup of *participants* (3.80)

3.51

focus group

group discussion

open discussion with a small number of selected *participants* (3.80) conducted by a *moderator* (3.67)

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).

3.52

fraudulent participant

participant (3.80) or *panel member* (3.79) who deliberately misrepresents their identity, *profile data* (3.87) or responses, or uses technology to bypass research project controls

3.53

frequency count

number of times a unique value appears in a data set

3.54

hidden question

statement or query in *surveys* (3.127) that is not visible to individuals

3.55

IMEI

International Mobile Equipment Identity

unique identifying number identifier attributed to every *digital device* (3.44), assigned by the manufacturer of the digital device, and regulated by the Global System for Mobile Communications (GSM) Association (GSMA)

Note 1 to entry: See also *device ID* (3.41).

3.56

imputation

procedure where missing data are replaced by estimated or modelled data

3.57

inattentive participant

participant (3.80) who does not give an adequate level of thought to the responses they provide

3.58

incentive

gift, payment or other considerations offered to potential *participants* (3.80) to increase participant cooperation

3.59

indexing

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

3.60

information security

preservation of *confidentiality* (3.25), integrity and availability of information

3.61

in-person intercept

sampling method whereby *fieldworkers* (3.49) invite potential *participants* (3.80) to undertake research activities while they are engaged in another activity, in a particular location. (e.g. on the street, shopping malls)

3.62

internal audit

in-house *audit* (3.13) carried out periodically by *competent* (3.22) individuals, to assess whether projects, processes and systems are consistent with the requirements within this document

Note 1 to entry: An internal audit can be carried out by the *service provider's* (3.120) personnel or subcontracted.

3.63

managed network

collaborative network of *panels* (3.78) sourced from multiple providers, using agreed quality controls, co-ordinated and administered by a single intermediary

3.64

management review

establishment of procedures approved by *senior management* (3.118) to review its management system at planned intervals to ensure its continuing suitability, adequacy and effectiveness, including the stated policies and objectives related to the management system

3.65

margin of error

statistical term for the degree of deviation within a *probability sample* (3.86)

3.66

marketplace

platform for buyers and sellers of *samples* (3.105)

3.67

moderator

individual responsible for facilitating the interactions among *participants* (3.80) of a *focus group* (3.51) or another *qualitative research* (3.90) forum

3.68

mystery shopper

observer

retail auditor

fieldworkers (3.49), researchers or *participants* (3.80) who observe and/or evaluate to a defined specification

3.69

mystery shopping

project using *fieldworkers* (3.49), researchers or *participants* (3.80) who observe and/or evaluate to a defined specification

3.70

near field communication

wireless technology that enables communication between devices over a short distance

3.71

netting

method of treating *codes* (3.20) assigned to multiple-response questions, which can include open-ended codes, where the net refers to the total number of *participants* (3.80) responding with the same group of codes, even when each participant has given more than one response within the same group of codes

3.72

non-probability sample

sample (3.105) from a population wherein each member's probability of being included is unknown

3.73

non-response

absence of measurement on some *sample* (3.105) or census members for all or some questions or variables

3.74

observational data collection

observational research

observational methodologies

collection of data through observation including 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* (3.82) and *physical observation* (3.84).

3.75

online intercept

sampling method that invites potential *participants* (3.80) to undertake research activities while they are online, e.g. from advertisements on *social media* (3.122), web browsing, web notices within apps and other websites to an online portal where they are screened for research projects in real time

3.76

open-ended question

type of question where *participants* (3.80) are asked to answer in their own words

3.77

opt-out

explicit request to terminate participation in a research project

3.78

panel

sample (3.105) database of potential *participants* (3.80) who declare that they will cooperate for future data collection if selected

3.79

panel member

individual recruited from a documented source who has provided *profile data* (3.87) and appropriate information for validation of identity, and has agreed to participate in research according to the terms and conditions of panel membership

3.80

participant

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

3.81

participation rate

number of *participants* (3.80) providing a usable response divided by the total number invited to participate

3.82

passive data collection

passive methodologies

process of data collection that avoids or minimizes active interaction with *participants* (3.80)

3.83

personal data

information that relates to a natural person and directly or indirectly allows that person to be identified

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.

3.84

physical observation

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 observation excludes *digital and online observation* (3.43).

3.85

primary record

data collected directly from the source and in their original state

Note 1 to entry: This can include *survey* (3.127) data, interview transcripts, field notes, video and audio recordings, browsing history, *personal data* (3.83) (e.g. biometric measurements and recordings).

3.86

probability sample

random *sample* (3.105) 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* (3.65)

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

3.87

profile data

descriptive characteristics of a *panel member* (3.79)

3.88

project-related document

documentation (or document), material or specification for the performance of research project, including research design, recruitment, data collection, *data processing* (3.35) and analysis

EXAMPLE *Questionnaire* (3.92), *discussion guide* (3.46), recruitment screener, *code frame* (3.21), *sampling frame* (3.111), proposal, quota specification.

3.89

publishing

dissemination of research outputs through any means

3.90

qualitative research

analysis of motivations, patterns of thought, opinion, attitude, assessment or behaviour, via research techniques such as *focus groups* (3.51), *depth interviews* (3.39), discourse content analysis and qualitative *observational data collection* (3.74)

3.91

quantitative research

numerical measurement of observations via research techniques such as *questionnaires* (3.92), opinion polls, *surveys* (3.127) and experimental research