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Introduction

This draft standard is based on national and international discussions. Your comments on this draft are invited and will assist in the preparation of the consequent standard.

For international standards, comments will be reviewed by the relevant UK national committee before sending the consensus UK vote and comments to the international committee, which will then decide appropriate action. If the international standard is approved, it is usual for the text to be published as a British Standard.

For national standards, comments will be reviewed by the relevant UK national committee and the resulting standards published as a British Standard.

UK Vote

Please indicate whether you consider the UK should submit a negative (with supporting technical reasons) or positive vote on this draft. Please indicate if you are aware of any reason why this draft standard should not be published as a British Standard.

Submission of Comments

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Template for comments and secretariat observations

Date: xx/xx/20xx	Document: ISO/DIS xxxx
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1	2	(3)	4	5	(6)	7
MB	Clause No./ Subclause No./Annex (e.g. 3.1)	Paragraph/ Figure/Table/Note	Type of comment	Comment (justification for change) by the MB	Proposed change by the MB	Secretariat observations on each comment submitted
	3.1	Definition 1	ed	Definition is ambiguous and needs clarifying.	Amend to read '...so that the mains connector to which no connection...'	
	6.4	Paragraph 2	te	The use of the UV photometer as an alternative cannot be supported as serious problems have been encountered in its use in the UK.	Delete reference to UV photometer.	



DRAFT International Standard

ISO/DIS 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*

ICS: 03.100.20; 01.040.03; 03.020

ISO/TC 225

Secretariat: **UNE**

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2025-06-12

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2025-09-04

This document is circulated as received from the committee secretariat.

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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).

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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 to the previous edition 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 to allow 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 ISO standards (e.g. ISO 27001);
- Terms and definitions included in [Clause 4](#) have been updated;
- [Annex A](#) has been split into two Annexes, with Sampling requirements remaining in [Annex A](#) and Panel Management moved 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](#); and
- 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.

The research business core framework remains and is documented as [Clause 4](#) of this document. [Clause 4](#) has been re-ordered and aligned with other standards (such as ISO 27001) which are complementary to ISO 20252. The language used in the document has been aligned with such standards to increase the accessibility and familiarity.

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 Annexes have been expanded with the addition of a new [Annex G](#), panel development and lifecycle 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 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 <https://www.electropedia.org/>

3.1

accuracy

degree of closeness between the estimate and the agreed parameter value

3.2

active panel member

panel member (3.77) who, within the last 12 months, has participated in at least one research project if requested, updated their profile data, or registered to join the *panel* (3.76)

3.3

algorithm

set of rules for transforming the logical representation of data

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

3.4

anonymize

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

3.5

appraisal

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

3.6

artificial intelligence

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

3.7

AI agent

automated entity that uses *AI* ([3.6](#)) to perform tasks, interact with its environment and take actions to achieve goals

3.8

asset

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

EXAMPLE Files, images, concepts.

3.9

attestation

declaration of conformity by the *service provider* ([3.114](#)) related to the statement of applicability (SoA)

3.10

audit

systematic, independent and documented process for obtaining evidence and evaluating it objectively to determine the extent to which of the organisation with *service providers* ([3.114](#)) conforms to the requirements of this document

3.11

auditor

person with the competence to conduct an *audit* ([3.10](#))

3.12

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* ([3.17](#)) lists, dictionaries, automated systems, machine learning, *artificial intelligence* ([3.6](#)) or other technologies

3.13

bias

systematic deviation between the estimate and the agreed parameter value

3.14

bot

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

3.15

business governance

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

3.16

client

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

3.17

code

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

3.18

code frame

list of categories with associated *codes* ([3.17](#)) for classifying responses

3.19

competent

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

3.20

completion rate

number of *participants* (3.78) who fully complete a research project divided by the number of participants who were invited to participate

3.21

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).

3.22

confidentiality

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

3.23

consent

freely given agreements based on adequate information obtained prior to the collection/use of *participant* (3.78) data

3.24

convenience sample

sample (3.104) chosen on the basis of accessibility, expediency, cost, efficiency, or other reason not directly concerned with sampling parameters

[SOURCE: ISO 11074:2015, 4.2.2]

3.25

cookie

small piece of information (i.e. program *code* (3.17)) that is stored on a browser for the purpose of identifying that browser during activities and between visits or sessions

3.26

corrective action

action or actions to eliminate the cause or causes of a non-conformity and to prevent recurrence

3.27

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.

3.28

data cleaning

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

3.29

data collection instrument

tool created for the purpose of gathering information from *participants* (3.78)

EXAMPLE Questionnaire, discussion guide, biometric device, web scraping technology, camera.

3.30

data editing

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

3.31

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.

3.32

data processing

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

3.33

data quality

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

[SOURCE: ISO 14044:2006, 3.19]

3.34

data record

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

3.35

de-duplication

process to remove *data records* (3.34) corresponding to *participants* (3.78) or *record* (3.93) that appears more than once in a research dataset or *panel* (3.76)

3.36

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* (3.78)

3.37

derived data item

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

3.38

device ID

device identification

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 or operating systems IDs to enable Wi-Fi or near field communications or uniquely identify a device on a mobile carrier network. Other unique device identifiers (such as *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 MAC (Media Access Control) address can be used as a device ID.

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

3.39

digital analytics

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

3.40**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 excludes physical observation.

3.41**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* ([3.126](#)) 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.

3.42**digital fingerprint**

information collected about a computer, tablet, smartphone or other computing device for the purpose of identification of individual research *participants* ([3.78](#)) 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.

3.43**discussion guide**

list of points or topics which are to be covered in a *depth interview* ([3.36](#)), *focus group* ([3.50](#)) or other *qualitative research* ([3.89](#)) method

3.44**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

3.45**drop-out****abandon****abandonment**

instances where *participants* ([3.78](#)) start and do not finish a research project

3.46**duplication**

situation where a *participant* ([3.78](#)) is invited or attempts to complete more than one response for a specified research project

3.47**exclusion request**

excluding a potential *participant* ([3.78](#)) from a research project based on their participation in a research project involving the same or similar product/service category and/or methodology

3.48**fieldworker****interviewer**

person involved in the collection of research

Note 1 to entry: Fieldworkers include, but are not limited to, face-to-face and telephone interviewers, recruiters for *qualitative* ([3.89](#)) 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* ([3.114](#)).

3.49

filter

question or instruction in a *data collection instrument* (3.29) that restricts answers to a subgroup of *participants* (3.78)

3.50

focus group

group discussion

open discussion with a small number of selected *participants* (3.78) 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).

3.51

fraudulent participant

participant (3.78) or *panel member* (3.77) who deliberately misrepresents their identity, profile data or responses or uses technology to bypass research project controls

3.52

frequency count

summary count of individual data items on a computer file

3.53

generative AI

branch of *Artificial Intelligence* (3.6) that focuses on creating systems and models capable of producing new and original content (e.g. text, images, videos) based upon user instructions

3.54

hidden question

deceptive technique deployed to check *participant* (3.78) engagement or to detect/counteract the fraudulent use of information systems

3.55

IMEI

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

3.56

imputation

procedure where missing data are replaced by estimated or modelled data

3.57

inattentive participant

participant (3.78) 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* (3.78) 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, integrity and availability of information

3.61

in person intercept

sampling method whereby *fieldworkers* (3.48) invite potential *participants* (3.78) to undertake research activities while they are engaged in another activity, in a particular location. (e.g. on street, shopping malls)

3.62

internal audit

in-house *audit* (3.10) carried out periodically by competent individuals, to assess whether projects have been carried out in accordance with the requirements of this document

Note 1 to entry: An internal audit can be carried out by the service provider's personnel or outsourced.

3.63

Large Language Model

LLM

models to generate language that can be also used for natural language processing such as coding or classification

3.64

machine learning

process of optimizing model parameters through computational techniques, such that the model's behaviour reflects the data or experience

EXAMPLE Speech recognition, predictive text, spam detection, neural networks, deep learning, Large Language Models, etc.

[SOURCE: ISO/IEC 22989:2022; 3.3.5, modified as additional examples have been added]

3.65

management review

establishment of procedures approved by top management 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

[SOURCE: ISO 17021-1:2015, 10.2.5.1, modified, "approved" has been added]

3.66

margin of error

statistical term for the degree of deviation within a research *sample* (3.104)

3.67

moderator

individual responsible for facilitating the interactions among *participants* (3.78) of a *focus group* (3.50) or other *qualitative research* (3.89) forum

3.68

mystery shopping

project using *fieldworkers* (3.48), researchers or *participants* (3.78) (consumers or general public) in the role of customers/users in order to evaluate a business/service performance

3.69

near field communication

wireless technology that enables communication between devices over a short distance

3.70

netting

method of treating *codes* (3.17) assigned to multiple-response questions, which can include open-ended codes, where the net refers to the total number of *participants* (3.78) responding with the same group of *codes* (3.17), even when each participant has given more than one response within the same group of *codes* (3.17)

3.71

non-response

absence of measurements on some *sample* (3.104) or census members for all or some questions or variables

3.72

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* (3.80) and *physical observational data collection* (3.82).

3.73

online intercept

sampling method that invites potential *participants* (3.78) to undertake research activities while they are online, e.g. from advertisements on *social media* (3.117), web browsing, web notices within apps, and other websites to an online portal where they are screened for research projects in real time

3.74

open-ended question

open-ended response

type of question where *participants* (3.78) are asked to answer in their own words

3.75

opt-out

explicit request to terminate participation in a research project

3.76

panel

sample (3.104) database of potential *participants* (3.78) 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 consent for follow-ups).

3.77

panel member

individual recruited from a documented source who has provided profile data and appropriate information for validation of identity, given explicit *consent* (3.23) to participate in research according to the terms and conditions of panel membership

3.78

participant

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

3.79

participation rate

number of *participants* (3.78) providing a usable response divided by the total number of initial personal invitations requesting members to participate

3.80

passive data collection

passive methodologies

process of data collection that avoids or minimizes active interaction with *participants* (3.78)

3.81**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.

3.82**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.

3.83**pre-screening**

initial questions in a *data collection instrument* ([3.29](#)) used to establish eligibility of *participants* ([3.78](#))

3.84**pre-test**

small-scale test to check the performance of a *data collection instrument* ([3.29](#)) or methodology before embarking on full-scale fieldwork

3.85**primary record**

data collected directly from the source and in their original state

Note 1 to entry: This can include *survey* ([3.122](#)) data, interview transcripts, field notes, personal data (e.g. biometric measurements and recordings).

3.86**probability sample**

random *sample* ([3.104](#)) 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* ([3.66](#))

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).

3.87**profile data**

descriptive characteristics of a *panel member* ([3.77](#))

3.88**project related document****documentation****documents**

documentation (or documents), materials and specifications for the performance of research project, including research design, recruitment, data collection, data processing, and analysis. Examples: *questionnaire* ([3.91](#)), *discussion guide* ([3.43](#)), recruitment screener, *code frame* ([3.18](#)), *sampling frame* ([3.109](#)), proposal, quota specification

3.89**qualitative research**

analysis of motivations, patterns of thought, opinion, attitude, assessment or behaviour, via research techniques such as *focus groups* ([3.50](#)), *depth interviews* ([3.36](#)), discourse content analysis and qualitative *observational research* ([3.72](#))

3.90**quantitative research**

numerical measurement of observations via research techniques such as *questionnaires* (3.91), opinion polls, *surveys* (3.122) and experimental research

3.91**questionnaire**

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

Note 1 to entry: Questionnaires can be self-completion, or administered by a *fieldworker* (3.48) or an AI agent.

3.92**quota sample**

sample (3.104) drawn using a non-probabilistic method (e.g. convenience samples or multiple source sampling), such that it conforms to a predefined structure with respect to certain variables

3.93**record**

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

Note 1 to entry: For example, a *questionnaire* (3.91) is a document, but once it is completed by a *participant* (3.78) or a *fieldworker* (3.48), it becomes a record.

3.94**recruiter**

person who identifies and invites potential *participants* (3.78) to take part in a research project

3.95**reliability**

overall consistency among replicated measures

Note 1 to entry: In this context, measurement has a high reliability if it can be repeated with the same or similar results under the same or similar conditions.

3.96**representativeness**

degree to which a *sample* (3.104) reflects the *target population* (3.124) being studied

Note 1 to entry: A representative sample is one in which the distribution of important characteristics is approximately the same as in the *target population* (3.124).

Note 2 to entry: The definition of ‘important characteristics’ is generally a function of the research topic.

3.97**response rate**

calculation of the proportion of people responding to a *survey* (3.122)

3.98**retail audit**

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

3.99**review**

assessment to determine the suitability, adequacy, and/or effectiveness of a project, process and/or system in achieving its established objectives

3.100**risk**

combination of the probability of an event and its consequences

[SOURCE: ISO Guide 73:2009, 1.1]

3.101

risk assessment

overall process of *risk* (3.100) identification, *risk* (3.100) analysis, *risk* (3.100) evaluation and *risk* (3.100) mitigation

[SOURCE: ISO 22734:2019. 3.30]

3.102

robot instruction file

file that defines how an internet search engine should interact with the pages and files of a web site and is often used to define where automated systems are not allowed to go

3.103

router

online software application that screens incoming *participants* (3.78) and then uses those results to assign research *participants* (3.78) to one of multiple available research projects

Note 1 to entry: A router can also offer *participants* (3.78) additional screeners and *surveys* (3.122) after screener qualification failure or *survey* (3.122) completion.

Note 2 to entry: It differs from “hardware router” as a communication equipment that relays data between two or more different networks.

3.104

sample

subset of the population of interest

3.105

sample aggregation

process of combining multiple *distinct sample* (3.104) sources without adjusting for differences in their composition

3.106

sample blending

process of merging multiple *sample* (3.104) sources while applying statistical techniques to ensure consistency and reduce *bias* (3.13) in order to create a more representative and homogenous sample

3.107

sample broker

intermediary that connects buyers and sellers of *samples* (3.104)

3.108

sample provider

individuals or organisations responsible for the provision and management of *samples* (3.104) from relevant sources such as *panels* (3.76) and other research database *participant* (3.78) sources, online intercept-based sources and email lists

Note 1 to entry: Sample providers can offer some or all of the following services:

- *sample broker* (3.107) services;
- *sample aggregation* (3.105); and
- *router* (3.13) technology

3.109

sampling frame

list of population elements or other appropriate sources from which a *sample* (3.104) is to be drawn

3.110

secondary data

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

3.111**secure end link**

steps taken to secure surveys through end link encryption, server to server communication or the hashing of the incoming or outgoing links - or equivalent measures

3.112**self-service****do-it-yourself****DIY**

technological platform facilitating some or all stages of a research project

3.113**sentiment**

mood associated with, for example, a sound, image or statement, usually on a continuum from positive to neutral to negative

3.114**service provider**

organization that conducts research projects or parts of research projects using statistical data and/or social science methods and techniques

EXAMPLE 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.

Note 1 to entry: Service providers can include specialist providers which provide specific services such as panel providers, *sample providers* (3.108) or language service providers.

3.115**screen out**

exclusion of *participants* (3.78) from progressing through a research project based on their answers to certain questions

3.116**silent call**

telephone call generated by a dialler and answered by a *participant* (3.78) before a *fieldworker* (3.48) is made available

Note 1 to entry: A dialler (automated dialling equipment) is any equipment or software able to dial a telephone number and make the call available to the *fieldworker* (3.48).

3.117**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

3.118**spyware**

devices or software that capture a *participant's* (3.78) data or behaviour without obtaining *consent* (3.23)

3.119**subcontract****outsource**

engage an external organisation or individual to perform part of the *service provider's* (3.114) function or process, under the responsibility of the *service provider* (3.114)

Note 1 to entry: Self-employed individual *fieldworkers* (3.48) are not defined as subcontractors for the purposes of this document.

Note 2 to entry: Hired or otherwise outsourced services and/or assets include, for example, *participant* (3.78) panels, cloud services, computer software and hardware, other technology platforms, electronic or other secure data storage facilities and *focus group* (3.50) venues.

3.120

sub-contractor

individual or organisation to whom a *service provider* ([3.114](#)) has contracted part of their activities

3.121

substitution

replacement of a term in a data set by another term during *data entry* ([3.31](#)) to enhance accuracy, correct errors, standardize terminology, or address missing data

3.122

survey

data collection from a *sample* ([3.104](#)) of a *target population* ([3.124](#)) to which inferences can be made

3.123

synthetic data

Information generated using computational or statistical models with the aim to replicate or approximate the statistical properties and relationships found in datasets already obtained

Note 1 to entry: may also be referenced as synthesised data, and labelled as synthetic *participants* ([3.78](#)) or personas.

3.124

target population

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

3.125

text analysis

content analysis

method used to describe the characteristics of a message

3.126

third party

independent organisation or individual not under the responsibility of the *service provider* ([3.114](#))

3.127

top management

person or group of people who directs or controls a *service provider* ([3.114](#)) at the highest level

3.128

training data

data used to train machine learning models

[SOURCE: ISO/IEC 22989:2022, 3.3.16]

3.129

unique visitor

inferred measure that signifies a distinct, unduplicated individual requesting a page from a website during a given period, regardless of how often they visit

3.130

validation

procedures to check conformity to specifications or requirements at any stage of the research process

3.131

validity

assurance that the results of a research process represent what was intended

3.132

vulnerable person

person who is permanently or temporarily unable to represent their own interests through a mental, emotional, societal or physical cause that may limit their capacity to make voluntary and informed decisions

3.133**wave**

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

3.134**web analysis**

analysing and reporting of behaviour, statements and *sentiments* (3.113) from users/*participants* (3.78) of online platforms

3.135**web beacon**

piece of *code* (3.17), often a 1 × 1 pixel, on a website used to track website activity

Note 1 to entry: This differs from a beacon, which is a low-powered transmitter that notifies nearby devices of its presence and can be used to trigger an action.

3.136**weighting**

calculation process in which different units or subgroups are recalculated by assigning numerical values, as necessary, to refine and/or correct the representativeness of *sample* (3.104) estimates

Note 1 to entry: Weighting can be used to adjust for unequal selection probabilities, such as multistage sampling, coverage *bias* (3.13) and *non-response* (3.71) bias.

4 Core requirements for market, opinion and social research

4.1 Core framework and legal requirements

4.1.1 Statement of applicability

The service provider shall create a statement of applicability (SoA) that describes the complete scope of the services attested to as meeting the requirements of this document. The SoA defines which annexes are in conformity with this document, to the extent such services are included in the service provider systems.

NOTE The intent is that the service provider attests the majority, if not all, of their research activities to this document.

Attestation to this document shall be achieved by the service provider when the core requirements (see [Clause 4](#)) and at least one of the following annexes, including all requirements cross-referenced to other annexes, are met:

- [Annex A](#) — Sampling;
- [Annex B](#) — Fieldwork;
- [Annex C](#) — Physical observation;
- [Annex D](#) — Digital and online observation;
- [Annex E](#) — Self completion;
- [Annex F](#) — Data management and processing;
- [Annex G](#) — Panel development and lifecycle management.

For service providers who specify [Annex A](#) in the SoA, whether directly or as subcontracted services, the additional requirements specified in [Annex A](#) shall apply.

For service providers who specify [Annex B](#) in the SoA, whether directly or as subcontracted services, the additional requirements specified in [Annex B](#) shall apply.

For service providers who specify [Annex C](#) in the SoA, whether directly or as subcontracted services, the additional requirements specified in [Annex C](#) shall apply.

For service providers who specify [Annex D](#) in the SoA, whether directly or as subcontracted services, the additional requirements specified in [Annex D](#) shall apply.

For service providers who specify [Annex E](#) in the SoA, whether directly or as subcontracted services, the additional requirements specified in [Annex E](#) shall apply.

For service providers who specify [Annex F](#) in the SoA, whether directly or as subcontracted services, the additional requirements specified in [Annex F](#) shall apply.

For service providers who specify [Annex G](#) in the SoA, whether directly or as subcontracted services, the additional requirements specified in [Annex G](#) shall apply.

Conformity to a particular annex is required only when that annex is specified in the SoA, or when a particular requirement is cross-referenced from an annex that is specified in the SoA.

Any communication of the attestation shall state clearly and unambiguously which annexes the service provider is in conformity with.

- a) The SoA (see [Figure 1](#)) shall record the attested scope by annex name and number as per this document as a clear and unambiguous declaration of which services are included, whether in-house or outsourced, and those excluded from the scope.
- b) The SoA shall be authorized and dated by a person in top management representing the attested service provider.
- c) The service provider shall make the SoA available to clients and other stakeholders at all times (e.g. on a web page).
- d) The service provider's SoA shall be subject to assessment against this document.
- e) The service provider shall not use subjective, marketing or redundant phrases within the SoA, such as 'high quality', 'tremendous', 'largest global organization' or 'highly accurate'.
- f) Product names can be included in the SoA if they are integral to a service provided.

The SoA shall be reviewed at least annually to determine the need for change and to ensure the details are accurate.

XYZ (Legal entity name) is a market, opinion, and social research organisation (insert brief description of the organisation).

XYZ Company delivers research services to (insert client/industry profiles) throughout (insert general geographical locations)

XYZ Company has elected to include (state research services covered) to be attested to this document in accordance with Annexes A, B, C, D, E, F and G (as appropriate). XYZ Company has elected to exclude (state research services not covered) from the attestation.

Details of XYZ Company attested annexes are described as follows:

For each annex, insert a descriptive statement of service provided, including any relevant technical specifications.

ANNEX	ATTESTED	EXCLUDED	EXPLANATION
Annex A — Sampling			
Annex B — Fieldwork			
Annex C — Physical observation			
Annex D — Digital and online observation			
Annex E — Self completion			
Annex F — Data management and processing			
Annex G — Panel development and lifecycle management			

Figure 1 — Example of a SoA template

4.1.2 Legal and other requirements

The service provider shall take a systematic approach to the management and communication of legal and business governance requirements and their implication to the services provided.

This may be in any form such as establishing, implementing and maintaining an internal legal register, list, or linking to up-to-date legal regulations.

The service provider shall ensure applicable legal requirements including sectoral requirements are considered when offering its services.

4.1.3 Confidentiality of research

4.1.3.1 General

Information supplied by clients for project purposes shall only be used by service providers in the context for which it was supplied. It shall not be made available to third parties without prior authorization by clients and shall be treated in the strictest confidence in accordance with client requirements.

Identifiable participant data are confidential, and all assurances given to participants shall be fulfilled.

Where databases or contact lists are provided by third parties (e.g. clients), the service provider shall request that third parties confirm that use of such sources conforms to industry codes and applicable legal requirements.

4.1.3.2 Participant reassurance

Invited or recruited participants shall be informed by the service provider that participation is voluntary and can be declined for any or without reasons.

When a participant withdraws consent, the service provider shall delete all the personal data (sample contact data and answers in relation to that specific research project).

The service provider shall ensure that participant reassurance occurs and shall provide transparency in relation to processing and sources of participants' personal data.

The service provider shall ensure that records relating to privacy and consent given by participants for the processing of their data are retained (including for children or other categories of vulnerable persons).

Where there is no direct contact between the service provider and the participant/s and it is not possible to provide direct assurances, privacy obligations shall still be met.

Reasonable precautions shall be taken by the service provider to ensure that participants and observed people (including those who may not be aware they are being observed) are not identified, harmed, or adversely affected as a result of their participation.

4.1.3.3 Invitations to participate in research projects

The service provider shall provide each potential participant invited to take part in a research project with appropriate information, including:

- a) a general description of the purpose of a project;
- b) the estimated length of their participation time;
- c) a statement of the confidentiality of each participant's responses;
- d) a statement of the anonymity and/or identification of each participant's responses;
- e) the closing date for completed responses (if applicable);
- f) full disclosure of incentive terms and conditions related to the project;
- g) information as to whether the invitation is sent out on behalf of another service provider; and
- h) the opportunity to unsubscribe, withdraw consent or opt-out of the research project.

Where participants ask for the above details of a project, if the information cannot be shared prior to participation, the service provider shall share these details after participation.

The requirements of [4.1.3.4](#) regarding the participation of children shall apply.