

This is a preview of "ISO 20252:2019". [Click here to purchase the full version from the ANSI store.](#)

Third edition
2019-02

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*



Reference number
ISO 20252:2019(E)

© ISO 2019



COPYRIGHT PROTECTED DOCUMENT

© ISO 2019

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
Fax: +41 22 749 09 47
Email: copyright@iso.org
Website: www.iso.org

Published in Switzerland

This is a preview of "ISO 20252:2019". [Click here to purchase the full version from the ANSI store.](#)

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	12
4.1 Core framework.....	12
4.1.1 Statement of applicability.....	12
4.1.2 Confidentiality of research.....	14
4.1.3 Documentation and records management.....	16
4.2 Personnel and infrastructure responsibilities.....	17
4.2.1 Personnel and organisational responsibilities.....	17
4.2.2 Personnel — Performance management.....	17
4.3 Information security.....	17
4.3.1 Information security risk framework.....	17
4.3.2 Information handling.....	18
4.3.3 Information security controls.....	18
4.3.4 Information security training and awareness.....	18
4.4 Subcontracting services.....	18
4.4.1 General.....	18
4.4.2 Subcontracted project work.....	19
4.5 Planning, delivery and reporting on projects and research work.....	19
4.5.1 General.....	19
4.5.2 Client relationship management.....	19
4.5.3 Project, work requests or other responses to offer services.....	21
4.5.4 Providing deliverables to the client.....	23
4.6 Management review and improvement.....	24
4.6.1 Input.....	24
4.6.2 Output.....	25
4.7 Internal audits.....	25
4.8 Legal requirements.....	25
Annex A (normative) Sampling including access panels	26
Annex B (normative) Fieldwork	39
Annex C (normative) Physical observation	48
Annex D (normative) Digital observation	50
Annex E (normative) Self completion	56
Annex F (normative) Data management and processing	60
Bibliography	66

Foreword

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

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

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

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

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

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

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

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

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

This is a preview of "ISO 20252:2019". [Click here to purchase the full version from the ANSI store.](#)

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.