

ISO 20252:2019 (E)

Market, opinion and social research, including insights and data analytics — Vocabulary and service requirements

Contents

	Foreword
	Introduction
1	Scope
2	Normative references
3	Terms and definitions
4	Core requirements for market, opinion and social research
4.1	Core framework
4.1.1	Statement of applicability
4.1.2	Confidentiality of research
4.1.2.1	General
4.1.2.2	Participant reassurance
4.1.2.3	Invitations to participate in research projects
4.1.2.4	Data collection from children or vulnerable persons
4.1.3	Documentation and records management
4.1.3.1	Documenting the systems and practices
4.1.3.2	Project research activity records
4.1.3.3	Records management
4.2	Personnel and infrastructure responsibilities
4.2.1	Personnel and organisational responsibilities
4.2.2	Personnel — Performance management
4.3	Information security
4.3.1	Information security risk framework
4.3.2	Information handling
4.3.3	Information security controls
4.3.4	Information security training and awareness
4.4	Subcontracting services
4.4.1	General
4.4.2	Subcontracted project work
4.5	Planning, delivery and reporting on projects and research work
4.5.1	General
4.5.2	Client relationship management
4.5.2.1	General
4.5.2.2	Product handling
4.5.3	Project, work requests or other responses to offer services
4.5.3.1	General
4.5.3.2	Delivery of project or other work
4.5.3.3	Conception and design of data collection instruments
4.5.3.4	Translation of data collection instruments and other project-related documents
4.5.3.5	Pretesting data collection instruments
4.5.3.6	Incentives
4.5.4	Providing deliverables to the client
4.5.4.1	General
4.5.4.2	Client reporting
4.5.4.3	Publication of research results
4.6	Management review and improvement
4.6.1	Input
4.6.2	Output
4.7	Internal audits

4.8 Legal requirements

Annex A (normative) Sampling including access panels

- A.1 General**
- A.2 Sampling**
 - A.2.1 General**
 - A.2.2 Sample size**
 - A.2.3 Sample selection and design**
 - A.2.4 Sample transparency**
 - A.2.4.1 Sample provider transparency**
 - A.2.4.2 Sample user transparency**
- A.3 Probability samples**
- A.4 Non-probability samples**
 - A.4.1 General**
 - A.4.2 Quality criteria for non-probability samples**
 - A.4.3 Sample duplication, device ID, cookies and similar objects**
 - A.4.3.1 General**
 - A.4.3.2 Device ID**
 - A.4.3.3 Cookies and other similar objects**
 - A.4.3.4 Other methods**
 - A.4.4 Sample blending**
 - A.4.5 Sampling automation**
 - A.4.6 Sample blending, sampling automation, technology-based solutions and personal data**
 - A.4.7 Fraudulent and inattentive responding**
 - A.4.8 Special considerations**
 - A.4.8.1 Mobile**
 - A.4.8.1.1 Unintended mobile participants**
 - A.4.8.1.2 New sample sources for mobile market research**
 - A.4.8.2 Category and other types of exclusions**
- A.5 Access panels**
 - A.5.1 General requirements for access panels**
 - A.5.2 Recruitment of new panel members**
 - A.5.2.1 Confidentiality and transparency for access panels**
 - A.5.2.2 Access panel recruitment**
 - A.5.2.3 Methods of recruitment**
 - A.5.2.4 Source of recruitment**
 - A.5.3 Validation of identity**
 - A.5.3.1 General**
 - A.5.3.2 Validation of identity at the recruitment stage**
 - A.5.3.3 Subsequent validation of identity**
 - A.5.4 Request to unsubscribe or opt out of the access panel**
 - A.5.5 Access panel structure and size**
 - A.5.5.1 Access panel structure**
 - A.5.5.2 Access panel size**
 - A.5.5.2.1 General requirements**
 - A.5.5.2.2 Re-contacts**
 - A.5.5.3 Profile data of panel members**
 - A.5.6 Access panel management**
 - A.5.6.1 General**
 - A.5.6.2 Incentives**
 - A.5.6.3 Maintenance**
 - A.5.6.4 Updating profile data of panel members**
 - A.5.6.5 System requirements**
 - A.5.6.6 Panel member support**
 - A.5.7 Access panel usage and frequency of participation**

Annex B (normative) Fieldwork

- B.1 General**
- B.2 Management, recruitment and training of fieldworkers**
 - B.2.1 Fieldworker recruitment**
 - B.2.2 Basic training for new fieldworkers**
 - B.2.3 Continuing training and appraisal of fieldworkers**
- B.3 Fieldworker identity document (ID)**
- B.4 Project briefing**

- B.4.1 General
- B.4.2 Quantitative projects
- B.4.3 Qualitative projects
- B.5 Telephone data collection/CATI
- B.5.1 General
- B.5.2 Landline and mobile telephone numbers
- B.5.3 Predictive dialling and silent calls
- B.5.4 Complaints and call backs
- B.6 Qualitative data collection
- B.6.1 General
- B.6.2 Qualitative participant recruitment
- B.6.3 Qualitative participant recruitment validation
- B.6.4 Qualitative moderation
- B.6.5 Recording of qualitative research interviews and participant confidentiality
- B.7 Validation of data
- B.7.1 General
- B.7.2 Validation methods
- B.7.2.1 Checking of data records
- B.7.2.2 Participant re-contact (back-checking)
- B.7.2.3 Monitoring for quality control purposes
- B.7.3 Validation levels
- B.7.4 Validation reports
- B.8 Client reporting for fieldwork methodologies
- B.8.1 Quantitative research
- B.8.2 Qualitative research

Annex C (normative) Physical observation

- C.1 General
- C.2 Physical observational data collection methodology
- C.3 Project briefing
- C.4 Client reporting for physical observational methodologies

Annex D (normative) Digital observation

- D.1 General
- D.2 Proposals and tenders
- D.2.1 Proposals and tenders from service provider to clients
- D.2.2 Other aspects to be established by the service providers
- D.2.2.1 General
- D.2.2.2 Data cleaning and editing
- D.2.2.3 Sentiment and/or text analysis
- D.2.2.4 Website usage and measurement analytics
- D.3 Execution of projects
- D.3.1 Digital analytics and web analysis data collection
- D.3.1.1 Data collection methodology
- D.3.1.2 Validation of data collection process
- D.3.1.3 Participant safeguards
- D.3.1.4 Weighting
- D.3.2 Protection of individuals
- D.3.3 Device monitoring

Annex E (normative) Self completion

- E.1 General
- E.2 Data collection
- E.3 Validation of self completion
- E.3.1 General
- E.3.2 Validation of identity
- E.3.3 Validation of response data

Annex F (normative) Data management and processing

- F.1 General
- F.2 Hard copy data entry
- F.2.1 Specifications
- F.2.2 Data entry validation for paper documents
- F.3 Accuracy of databases not requiring manual data entry

F.4	Coding
F.4.1	General
F.4.2	Developing code frames for manual and semi-automated coding
F.4.3	Code frame approval
F.4.4	Coding briefing
F.4.5	Code updating
F.4.6	Other categories
F.4.7	Validation of coding
F.5	Data editing
F.5.1	Pre-entry data editing
F.5.2	Post-entry data editing
F.5.3	Data cleaning documentation
F.5.4	Weighting documentation
F.6	Data file management
F.7	Data analysis
F.7.1	Specifications for data analysis
F.7.2	Data analysis validation
F.7.3	Data tables
F.8	Data file management
F.8.1	General
F.8.2	Transfer of data to clients

Page count: 66