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

Reference number
ISO 20252:2026(en)

© ISO 2026



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**

© ISO 2026 – All rights reserved

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.

© ISO 2026 – All rights reserved

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.

© ISO 2026 – All rights reserved

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]

© ISO 2026 – All rights reserved

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

© ISO 2026 – All rights reserved

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

© ISO 2026 – All rights reserved

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

© ISO 2026 – All rights reserved

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-Fi©[1)] 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.

© ISO 2026 – All rights reserved

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

© ISO 2026 – All rights reserved

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

© ISO 2026 – All rights reserved

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

© ISO 2026 – All rights reserved

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

© ISO 2026 – All rights reserved

3.92
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* (3.49) or an *artificial intelligence agent* (3.10).

3.93
quota sample
sample (3.105) drawn using a non-probabilistic method (e.g. *convenience samples* (3.27) or multiple source sampling), such that it conforms to a predefined structure with respect to certain variables

3.94
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* (3.92) is a document, but once it is completed by a *participant* (3.80) or a *fieldworker* (3.49), it becomes a record.

3.95
recruiter
person who identifies and invites potential *participants* (3.80) to take part in a research project

3.96
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.

3.97
representativeness
degree to which a *sample* (3.105) reflects the *target population* (3.129) 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.

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

3.98
response rate
calculation of the proportion of people responding to a *survey* (3.127)

3.99
retail audit
collection of data from retail outlets using documentary (e.g. paper or digital) and/or observational methods

3.100
review
assessment to determine the suitability, adequacy and/or effectiveness of a project, process and/or system in achieving its established objectives

3.101
risk
combination of the probability of an event and its consequences

3.102
risk assessment
overall process of *risk* (3.101) identification, risk analysis, risk evaluation and risk mitigation

[SOURCE: ISO 22734-1:2025, 3.39, modified — Note 1 to entry deleted.]

© ISO 2026 – All rights reserved

3.103
robot instruction file
file that defines how an internet search engine interacts with the pages and files of a website and is often used to define where automated systems are not allowed to go

3.104
router
online software application that screens incoming *participants* (3.80) and then uses those results to assign research participants to one of multiple available research projects

Note 1 to entry: A router can also offer participants additional screeners and *surveys* (3.127) after screener qualification failure or survey completion.

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

3.105
sample
subset of the population of interest

3.106
sample aggregation
process of combining multiple distinct *sample* (3.105) sources without adjusting for differences in their composition

3.107
sample blending
process of merging multiple *sample* (3.105) sources while applying statistical techniques to ensure consistency and reduce *bias* (3.16) in order to create a more representative and homogenous sample

3.108
sample broker
intermediary that connects buyers and sellers of *samples* (3.105)

3.109
sample exchange
technology enabled platform where multiple suppliers provide *samples* (3.105) for purchase by buyers in real time

3.110
sample provider
individuals or organizations responsible for the provision and management of *samples* (3.105) from relevant sources such as *panels* (3.78) and other research database *participant* (3.80) 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* (3.108) services;

— *sample aggregation* (3.106);

— *router* (3.104) technology.

3.111
sampling frame
list of population elements or other appropriate sources from which a *sample* (3.105) is to be drawn

3.112
screening
systematic process to confirm or establish the eligibility of *participants* (3.80)

Note 1 to entry: Screening can be undertaken pre, during or post data collection.

© ISO 2026 – All rights reserved

3.113
screen out
exclusion of *participants* (3.80) from progressing through a research project based on their answers to certain questions

3.114
secondary data
data that have already been collected and are available from another source

3.115
secure end link
security methods that ensure research projects and *participant* (3.80) data are recorded accurately and protected whilst in transit

3.116
security classification
category to which data and systems are assigned to denote the degree of protection required

3.117
self-service
do-it-yourself
DIY
technological platform facilitating some or all stages of a research project

3.118
senior management
person or group of people who directs or controls a *service provider* (3.120) at the highest level

3.119
sentiment
feeling or attitude associated with, for example, a sound, image or statement, usually on a continuum from positive to neutral to negative

3.120
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* (3.78) providers, *sample providers* (3.110) or language service providers.

3.121
silent call
telephone call generated by a dialler and answered by a *participant* (3.80) before a *fieldworker* (3.49) 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.

3.122
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

3.123
spyware
devices or software that capture a *participant's* (3.80) data or behaviour without obtaining *consent* (3.26)

© ISO 2026 – All rights reserved

3.124
subcontract
outsource
engage an external organization or individual to perform part of the *service provider's* (3.120) function or process, under the responsibility of the service provider

Note 1 to entry: Hired or otherwise subcontracted services and/or *assets* (3.11) include, for example, *participant* (3.80) *panels* (3.78), cloud services, computer software and hardware, other technology platforms, electronic or other secure data storage facilities and *focus group* (3.51) venues.

3.125
subcontractor
individual or organization to whom a *service provider* (3.120) has contracted part of its activities

Note 1 to entry: Self-employed individual *fieldworkers* (3.49) are not defined as subcontractors for the purposes of this document.

3.126
substitution
replacement of a term in a data set by another term during *data entry* (3.34) to enhance *accuracy* (3.1), correct errors, standardize terminology or address missing data

3.127
survey
data collection from a *sample* (3.105) of a *target population* (3.129) from which inferences can be made

3.128
synthetic data
information generated by computational or statistical models from real-world (usually historical) data, designed to approximate the patterns, characteristics or statistical attributes of the target group

3.129
target population
group of people of interest in the research project to which inferences are made

3.130
text analysis
content analysis
method used to describe the characteristics of a message

3.131
third party
independent organization or individual not under the responsibility of the *service provider* (3.120)

3.132
training data
data used to train *AI* (3.9) and other related technologies or models

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

3.133
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

3.134
validation
procedures to check conformity to specifications or requirements at any stage of the research process

3.135
validity
assurance that the results of a research process represent what was intended

© ISO 2026 – All rights reserved

3.136
vulnerable person
person who is permanently or temporarily unable to represent their own interests through a mental, emotional, societal or physical cause that can limit their capacity to make voluntary and informed decisions

3.137
wave
successive repetition in a continuous project in which neither the objective nor the general project design change

3.138
web analysis
analysing and reporting of behaviour, statements and *sentiments* (3.119) from users/*participants* (3.80) of online platforms

3.139
web beacon
piece of *code* (3.20), 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.

3.140
weighting
calculation process in which different units or subgroups are recalculated by assigning numerical values, as necessary, to refine and/or correct the *representativeness* (3.97) of *sample* (3.105) estimates

Note 1 to entry: Weighting can be used to adjust for unequal selection probabilities, such as multistage sampling, coverage *bias* (3.16) and *non-response* (3.73) bias.

4 Core requirements for market, opinion and social research, insight and data analytics

4.1 Core framework and legal requirements

4.1.1 Statement of applicability

The service provider shall create a 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 its 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 life cycle management.

© ISO 2026 – All rights reserved