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ISO/TC 225

Title: "Market, opinion and social research"

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REQUESTED ACTION

Circulated to P- and O-members, and to technical committees and organizations in liaison for:

- information
- discussion at
- comments by
[date]
- voting (P-members only: ballot form attached) by

[date]

- send your proposal by

P-members of the technical committee or subcommittee concerned have an obligation to vote.

Strategic Business Plan

Approved at the Mexico Meeting - 2nd March 2018 (see TC 225 Decision 1/2018)

Note of the secretariat:

This is the final version. Minor edits have been made on N 235



EXECUTIVE SUMMARY

The *Global Insights and Analytics industry* is estimated to have annual turnover of just over \$70bn US, of which the *traditional Market, Opinion and Social Research (MOSR) industry* comprises just over \$40bn. While 80% of traditional MOSR spending is in North America and Europe, the fastest proportionate growth is found in the developing markets.

International subcontracting is a significant practice within the industry, with over one quarter of MOSR spending coming from international projects where all or part of the project includes fieldwork in other countries. MOSR quality standards enable research users to conduct research across many countries with increased confidence that the work will be conducted consistently and on a comparable basis from country to country.

As technology has progressed and improved, MOSR is being more and more influenced and led by technological advancements including artificial intelligence, machine learning, and neural networks. These technological advances could have significant impacts on how companies treat transparency and other essential components of the standards with consumers, clients, and third parties.

ISO/TC 225's main objective is to support and encourage higher and more consistent levels of quality in the research carried out in the market, opinion and social research (MOSR) sector, by maintaining and promoting comprehensive quality standards.

Going forward, TC 225 will consider all suggestions for revising, correcting or adding to its MOSR standards, including the addition of a new annex for a new technique or the creation of a new standard. TC 225 will continue to review and evaluate new research methodologies as they appear and gain acceptance in MOSR, including new methodologies relevant to MOSR that are being developed by the wider insights and analytics sector. Similarly, where new advancements in technology (e.g. automation, artificial intelligence, machine learning) have or could have potential impacts on research methodologies, those advancements will be evaluated by the TC

The immediate priority for the Committee is to complete the comprehensive revision to ISO 20252, publish the revised standard, and then promote its acceptance and use worldwide.



1. INTRODUCTION

1.1 ISO technical committees and business planning

The extension of formal business planning to ISO Technical Committees (ISO/TCs) is an important measure which forms part of a major review of business. The aim is to align the ISO work programme with expressed business environment needs and trends and to allow ISO/TCs to prioritize among different projects, to identify the benefits expected from the availability of International Standards, and to ensure adequate resources for projects throughout their development.

1.2 International standardization and the role of ISO

The foremost aim of international standardization is to facilitate the exchange of goods and services through the elimination of technical barriers to trade.

Three bodies are responsible for the planning, development and adoption of International Standards: ISO (International Organization for Standardization) is responsible for all sectors excluding Electrotechnical, which is the responsibility of IEC (International Electrotechnical Committee), and most of the Telecommunications Technologies, which are largely the responsibility of ITU (International Telecommunication Union).

ISO is a legal association, the members of which are the National Standards Bodies (NSBs) of some 164 countries (organizations representing social and economic interests at the international level), supported by a Central Secretariat based in Geneva, Switzerland.

The principal deliverable of ISO is the International Standard.

An International Standard embodies the essential principles of global openness and transparency, consensus and technical coherence. These are safeguarded through its development in an ISO Technical Committee (ISO/TC), representative of all interested parties, supported by a public comment phase (the ISO Technical Enquiry). ISO and its Technical Committees are also able to offer the ISO Technical Specification (ISO/TS), the ISO Public Available Specification (ISO/PAS) and the ISO Technical Report (ISO/TR) as solutions to market needs. These ISO products represent lower levels of consensus and have therefore not the same status as an International Standard.

ISO offers also the International Workshop Agreement (IWA) as a deliverable which aims to bridge the gap between the activities of consortia and the formal process of standardization represented by ISO and its national members. An important distinction is that the IWA is developed by ISO workshops and fora, comprising only participants with direct interest, and so it is not accorded the status of an International Standard.



2 BUSINESS ENVIRONMENT OF THE ISO/TC

2.1 Description of the Business Environment

The following political, economic, technical, regulatory, legal and social dynamics describe the business environment of the industry sector, products, materials, disciplines or practices related to the scope of this ISO/TC, and they may significantly influence how the relevant standards development processes are conducted and the content of the resulting standards:

The business environment for organizations and professionals conducting market, opinion and social research

Economic: market, opinion and/or social research (MOSR) is a global sector with a significant proportion of research projects involving multi-country studies. Clients marketing and developing their products, services and policies in multiple countries must adapt their strategies to the unique economic and cultural factors existing in each country. They therefore require that the MOSR conducted in each country, and by different suppliers, meets the same minimum standards of quality.

Technical: Methodologies for collecting and analyzing MOSR information continue to evolve at a rapid rate, requiring ongoing review and updating of quality standards. Digital research has grown to become a mature methodology over the past two decades. More recently, new information sources, including social media and “big data” have expanded rapidly and are used by the industry and profession, as well as other organizations and practitioners peripheral to the traditional MOSR industry.

Regulatory and Legal: Regulation of this sector is subjected to national and regional particularities on topics such as labour legislation, privacy/data protection, procedures of work, restrictions in the use of some tools (telephone, digital), etc.

Societal: When seeking professional help to conduct market, opinion or social research, the client or user needs a uniform standard to judge the robustness of processes and procedures of the provider in the delivery of MOSR. Consumers and citizens benefit indirectly from MOSR, since manufacturers and service providers can produce better products and services and policy makers make better decisions; all of which are more suitable to business and people’s needs, with producers and policy makers communicating the benefits more effectively.

International: Social and cultural differences in behavior and attitudes to products and services are a genuine reflection of the real differences that exist between countries. A comprehensive international quality standard enables clients to commission large scale studies across multiple countries with confidence that the working procedures will be more consistent yielding more accurate comparisons.



2.2 Quantitative Indicators of the Business Environment

The following quantitative indicators describes the business environment in order to provide adequate information to support actions of the ISO/TC:

Together, North America and Europe account for just over 80% of worldwide market, opinion and social research spending. However, the fastest proportionate growth is found in the developing markets, led (in order) by Africa, Non-EU Europe, Latin America, Asia Pacific and the Middle East. (ESOMAR GMR report 2017)

MR Turnover by Region in 2016		
	USD \$bn	%
World Total	44.5	100
North America	19.8	45
Europe	15.8	36
Asia Pacific	6.5	15
Latin America	1.5	3
Africa	0.5	1
Middle East	0.4	1

Source : ESOMAR Global Market Research Report for 2017. Data is for traditional research industry only and does not include the non-traditional practitioners as described in section 2.2.3.

Note: does not include research undertaken by non-profit research institutes, or by governments, universities or ad agencies using their own resources

2.2.1 Methodology

Quantitative research has seen a monumental shift over the past two decades, with online surveys and other electronic/digital means of collection now established as dominant methodologies, at the expense of traditional methodologies, particularly telephone and face-to face (which has seen the largest decline). (Based on historical ESOMAR GMR reports)

MR Turnover in 2016 by Methodology (%)	100%		100%
Quantitative	70	Qualitative	16
<u>Online/digital methodologies</u>	<u>50</u>	- Group discussion	6
- Online (general)	27	- Online research communities	6
- Auto/digital/electronic	12	- In-depth interviews	2
- Mobile/smartphone	5	- Ethnography	1
- Traffic/Audience	6	- Other qualitative	1
<u>Traditional methods</u>	<u>20</u>		
- Telephone (CATI)	8		
- Face-to-face	7		
- Postal	1		
- Other quantitative	4	Other Methodologies	14

Source : ESOMAR Global Market Research Report for 2017.

It is important to realize that the shift to digital has occurred primarily in larger and more established markets – specifically North America, along with selected markets in Europe and Asia/Pacific. For some European countries, and most developing countries, telephone and/or face to face remain the dominant methodologies, often by a wide margin. (ESOMAR GMR report for 2017)



2.2.2 Domestic vs international

ESOMAR estimates that 18% of 2016 revenue is generated from **international clients**. While high proportions of international revenue are reported by countries typically associated with offshore outsourcing, some major markets (e.g., Germany, Belgium) also report significant international business.

ESOMAR estimates that 27% of 2016 revenue comes from **international projects** where all or part of the project includes fieldwork in one or more other countries.

Clearly, international subcontracting remains a significant practice within the sector highlighting the need for consistent worldwide standards throughout the research supply-chain.

2.2.3 The wider “insights and analytics” sector

In cooperation with Outsell Inc, ESOMAR has been working to better understand the breadth and makeup of an expanded global research industry that includes organizations and individuals working outside the traditional marketing research framework.

Including these other elements expands the size of the industry to over \$70bn.

2016 – US \$bn	Traditional Industry	Expanded Industry	
Traditional market research	44.5	40.2*	* Excludes non-traditional revenue reported by traditional research industry, to avoid double counting.
Non-traditional insights and analytics		31.3	
Online analytics		9.5	
Management Consultants		5.9	
IT & telecom research		4.4	
Marketing reports and research		3.9	
Social media monitoring		2.7	
Social media & communities		2.1	
Web traffic measurement		1.2	
Sample & panel providers		0.1	
Survey software		0.1	
Total value of expanded market		71.5	
Source: ESOMAR Global Market Research report for 2017			



2.2.4 The impact of technology

As technology has progressed and improved, market, opinion, and social research is being more and more influenced and led by technological advancements. Automation has transferred some of the more basic tasks of data collection, data analysis, report writing, and other repetitive tasks from people to systems.

We are now starting to grasp the impact that artificial intelligence, machine learning, and neural networks will have on our industry. Systems that used to handle automation via known, detailed rule-based processes will soon be tasked with handling less defined, and more ambiguous tasks traditionally trusted to humans.

These technological advances could have significant impacts on how companies treat transparency and other essential components of the standards with both consumers, clients, and third parties.

2.3 Quality standards and professional standards

Business and society's growing reliance on market, opinion and social research for business and policy decisions, and concerns over data and privacy have underscored the need for self-regulation and quality standards. The growth of market research in developing markets highlights the continuing need to establish strong standards that cross international boundaries.

Quality Standards

ISO 20252, the International Quality Standard for Market, Opinion and Social Research, Insight and Analytics was developed by ISO TC 225, first published in 2006, revised in 2012 and is being revised again for publication in 2018/19. In at least 18 countries, ISO 20252 has been adopted by the standardization body and/or endorsed by the professional and trade associations.

- Over 315 research agencies are now 3rd party certified to ISO 20252, with another 160+ agencies declaring self-compliance.
- The strongest take up for 3rd party certification is in Australia (100), UK (75), Netherlands (45) and Spain (20).
- Self-compliance is more prevalent in Japan (121), Germany (25) and Italy (10)

ISO 26362, the International Quality Standard for Access Panels in Market, Opinion and Social Research was developed by TC 225 and published in 2009. ISO 26362 has been adopted or endorsed in at least 11 countries.

- Over 50 research agencies are now certified to ISO 26362, primarily in Netherlands (22), Australia (15) and Germany (7).
- Self-compliance to ISO 26362 is declared by at least 12 agencies, including in Italy (5), Germany (5) and Austria (2)

ISO 19731, the International Standard for Digital Analytics and Web Analyses for purposes of Market, Opinion and Social Research has been developed by TC 225, published in 2017 and adopted or endorsed in at least 5 countries.

- As of January 2018 there were 6 agencies 3rd party certified to ISO 19731 (all in Netherlands) and 2 agencies declaring self-compliance (all in Germany).



Professional Standards

All ESOMAR members and the companies listed in the ESOMAR directory, have undertaken to abide by the ICC/ESOMAR International Code on Market, Opinion and Social Research and Data Analytics. This Code, and similar Codes of Conduct and/or Practice developed by national associations to reflect the needs and requirements of their markets, are also applied by over 100 professional and/or trade associations worldwide.

The ICC/ESOMAR Code and similar national codes consider privacy regulations and sets out the core principles governing researchers' relations with respondents and participants, with clients and with other researchers. Its key principles are that participant/respondents' co-operation is always voluntary, their confidentiality should be maintained, and that market, opinion and social research activities must be clearly differentiated from direct marketing and other commercial activities. The various Codes are supported by a number of guidelines and/or regulations.

3 BENEFITS EXPECTED FROM THE WORK OF THE ISO/TC

The purpose of the standardization work at ISO level is to unify the criteria for the procedure of work and establish level of requirements for the provision of the service. Consequences of this work will be to remove possible trade barriers between regions or countries of the world; and to enable research users to conduct research across many countries with increased confidence that the work will be conducted consistently and on a comparable basis from country to country.

Examples of additional benefits include:

- Good for clients who receive guidance regarding what to ask for
- Good for research providers who will know what is expected from them
- Good for countries that do not have national standards
- General improving of research quality and the profession
- Strengthening the research supply-chain via the sub-contracting provisions
- Emphasizing the importance and value of market, opinion and social research in business and society



4 REPRESENTATION AND PARTICIPATION IN THE ISO/TC

4.1 Membership

Participating and Observing members of ISO/TC225 can be found at <https://www.iso.org/committee/324087.html?view=participation>

Liaisons are listed at <https://www.iso.org/committee/324087.html>; please click on Liaisons tab.

4.2 Analysis of the participation

TC225 currently enjoys representation from all major regions (with the exception of Latin America), along with support from ARIA, EFAMRO, ESOMAR and WAPOR.

TC225 member countries	%*	Participating	Observing	Liaison
North America	45	Canada		ARIA
Europe	36			EFAMRO
– EU 15	33	Austria Italy Netherlands Spain United Kingdom	Cyprus Finland France Sweden	
– New EU	1	Bulgaria	Czech Republic Slovakia Romania	
– Other Europe	2	Russia Serbia	Turkey	
Asia Pacific	15	Australia China Japan	Korea Sri Lanka Thailand	
Latin America	3	Mexico	Argentina Uruguay	ARIA
Africa	1	Algeria South Africa	Morocco	
Middle East	1	Iran Israel	Egypt	
Worldwide	100			ESOMAR WAPOR
* Percent of worldwide MR spend in 2016 Source: ESOMAR Global Market Research report for 2017				



5 OBJECTIVES OF ISO/TC 225 AND STRATEGIES FOR THEIR ACHIEVEMENT

5.1 Defined objectives of the ISO/TC 225

The overriding objective of ISO/TC 225 is to support and encourage higher and more consistent levels of quality in the research carried out in the market, opinion and social research (MOSR) sector, by maintaining and promoting comprehensive quality standards. These standards set out guidance and requirements directly relating to the way in which MOSR projects are planned, carried out, supervised and reported to the clients commissioning such projects and cover all stages of a research project from initial contact between client and service provider to presentation of results to the client.

5.2 Identified strategies to achieve the ISO/TC's defined objectives

Maintaining the standards

WG 1 is in the final stages of consolidating all MOSR standards into a new version of ISO 20252 which will be published in 2018 or 2019. This standard includes requirements for both access panels and digital analytics/web analyses when used for research purposes. Upon publication of the new ISO 20252 for Market, Opinion and Social Research:

- ISO 26362 Access panels in market, opinion and social research will be retired.
- ISO 19731 Digital analytics and web analyses in market, opinion and social research will remain active. A decision on whether to subsequently retire ISO 19731 will be deferred until an assessment can be made of the extent to which there is a demand for this standard from providers, including data aggregators, that are not interested in attesting to the umbrella standard, ISO 20252, and/or not part of the traditional MOSR community.

Going forward, TC 225 will consider all suggestions for revising, correcting or adding to its MOSR standards, including the addition of a new Annex for a new technique or the creation of a new standard. Where updating of the main standard is warranted, the TC will consider whether a revision of the full standard is advisable or whether the change can be better accomplished, on an interim basis, by creating an amendment to the standard.

TC 225 will continue to review and evaluate new research methodologies as they appear and gain acceptance in MOSR, including new methodologies relevant to MOSR that are being developed by the wider insights and analytics sector. Similarly, where new advancements in technology (e.g. automation, artificial intelligence, machine learning) have or could have potential impacts on research methodologies, those advancements will be evaluated by the TC.

Where a new methodology is significantly dependent on services provided by other industries and professions not part of the MOSR community, consideration will be given to whether the new methodology should be initially developed as a separate stand-alone standard or incorporated directly as a new annex in the main standard.

Promoting the standards

TC 225 will initiate and maintain communications programs to increase the awareness of and interest in ISO standards among MOSR communities worldwide. The Committee will enlist the support and assistance of international and national research associations to support the work of the TC and encourage the adoption and use of its standards.



TC 225 maintains a Communications Committee which works to create awareness and interest in the MOSR quality standards among research communities worldwide, using social media, webinars and other cost-effective methods to reach these communities. This Committee will encourage contact with national research associations where such associations can be identified, provide background information on MOSR standards; and invite them to join TC 225, nominate experts to participate in the work of the TC and promote MOSR standards among its members.

6 FACTORS AFFECTING COMPLETION AND IMPLEMENTATION OF THE ISO/TC WORK PROGRAMME

While TC 225 currently enjoys participation and contribution from countries in Europe, North America and Asia/Pacific, it is lacking active participation from Latin America, Africa, Middle East and Eastern Europe.

It remains an ongoing challenge to attract a sufficient number of experts with relevant direct experience in the various MOSR methodologies to serve on WGs and drafting committees.

7 STRUCTURE, CURRENT PROJECTS AND PUBLICATIONS OF THE ISO/TC

Information on ISO online

The link below is to the TC's page on ISO's website:

<https://www.iso.org/committee/324087.html>

Click on the tabs and links on this page to find the following information:

- About (Secretariat, Secretary, Chair, Date of creation, Scope, etc.)
- Contact details
- Structure (Subcommittees and working groups)
- Liaisons
- Meetings
- Tools
- Work programme (published standards and standards under development)

Reference information

Glossary of terms and abbreviations used in ISO/TC Business Plans

General information on the principles of ISO's technical work