

GLOBAL MARKET RESEARCH 2014

An ESOMAR Industry Report

in cooperation with BDO Accountants & Advisors

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ESOMAR is the essential organisation for encouraging, advancing and elevating market research worldwide.

With over 4,900 members in 130 countries, ESOMAR promotes the value of market, social and opinion research in illuminating real issues and bringing about effective decision-making.

To facilitate this ongoing dialogue, ESOMAR creates and manages a comprehensive programme of industry-specific and thematic events, publications and communications as well as actively advocating self-regulation and the worldwide code of practice.

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FOREWORD

Welcome to the Global Market Research Report, covering 2013.



Finn Raben
ESOMAR Director
General

Each issue of this report has traditionally marked a number of important developments in our profession, and this year is no different! Firstly, the more traditionally defined “market research” sector now surpasses the US\$ 40 billion mark, putting it on a par with the global Wi-Fi market, or the recorded music industry. Secondly, North America (including the USA - the single largest research market globally) now assumes top spot on the podium as the fastest growing region globally, and while global growth is on a par with that recorded last year, there is substantial optimism for 2014 which has been borne out by many of the half-year investor reports that have been circulated to-date.

Some of the key topline findings in this report are:

- Our market does continue to grow globally, and now exceeds US\$ 40 billion in value;
- Parts of Europe still struggle to overcome the economic ‘hangover’ from the crisis;
- North America now leads global growth, underpinned by a resurgence in Qualitative in the USA;
- China’s growth rate has declined by more than half in the past year, but the size of the market research industry in China is now quickly catching up with Japan, the most developed market in the region;

- The Middle East records growth at the regional level, but shows a more complex and diverse picture at the sub-regional level

Applying the extended definition of the market to our measure, the value of the industry grows by 50% (!!) from US\$ 40 billion to US\$ 60 billion, the equivalent value of the electronic gaming industry and the highest valuation ever recorded. We also see (as the ownership of companies change), a more dynamic Top 10 company listing, echoing a greater movement of funding and investment, stemming (we believe) from increased optimism about the industry.

A continuing challenge however, is that we still need to do more to raise the value of our profession – to legislators, to users and most importantly, to our participants and consumers. The importance of research and insight to society, to government and to business simply cannot be stressed enough, so allow me a small plea: Help us celebrate what we do, louder and farther in 2014 and beyond!

To complement these important milestones, you will note that our report has also had a slight makeover; we hope that you like the new format – as well as the additional information contained within – so please let us have your feedback or comments to: industrysurvey@esomar.org

It is only with your input, your guidance and your support that we can continue to encourage, advance and elevate the cause of market research globally!

Lastly (and as always), we owe a large debt of gratitude to the many people who make this study possible: to the sounding board, trade associations, industry experts and ESOMAR representatives whose support is essential to the production of this report – thank you, one and all for all of your contributions.

A very special word of thanks must also go to our tireless and dedicated partners – John Smurthwaite, Jo Bowman and Larry Gold – whose time, efforts, regional expertise and guidance are critical to the success of the Global Market Research Report.

I hope this report will continue to provide you with the authoritative review of the market it sets out to, and I look forward to any thoughts or suggestions on how we may further improve it to meet your needs.

With best regards,

Finn Raben
ESOMAR Director General

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1. HIGHLIGHTS

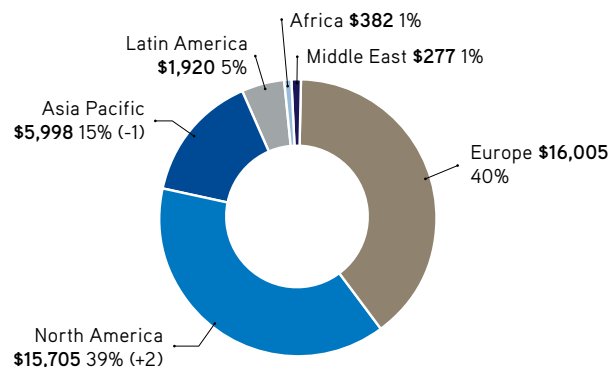
The latest developments in market research industry size, performance, consolidation, composition of clients sectors and research methods.

1.1 THE TOP LINE

The global size of our profession continues to grow, as worldwide turnover reaches US\$ 40,287 million in 2013, representing an annual/year-on-year increase of 2.8% and 0.7% after inflation is factored in. The North American research market now appears to have fully recovered from the economic downturn of recent years and is rewarded with the title of fastest growing region for the first time since 2000. This year it is the USA, which is making up for sluggish performances in some of the world's other large research markets.

Global market research turnover 2013

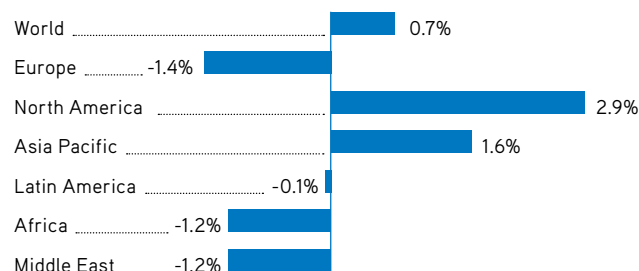
US\$ 40,287 million



ESOMAR estimates. Rounded figures presented
Percentage point changes in market share
compared to 2012 are provided between brackets.

Net growth rates 2013

(adjusted for inflation)



Exchange rate fluctuations eliminated.
IMF inflation rates used to determine growth.

- Market research turnover increases in 49 countries or sub-regions, and declines in 40, after adjustment for inflation.
- North America, accounting for 39% of global research sales, buoyed the industry, recording 2.9% net growth.
- Asia Pacific is the second of two regions that recorded positive growth for the year 2013.
- Latin America, which was the best performing region in 2013, saw research turnover drop by 0.1%, impacted by inflation and declines for the region's largest markets, Brazil and Mexico.
- Europe still struggles to counter the effects of the ongoing economic pains and saw the market decline for a third consecutive year.
- The Middle East and Africa posted steady growth in absolute terms, but this turned into net declines after the inflationary measures were made. ■

1.2 REGIONAL PROFILES

Europe

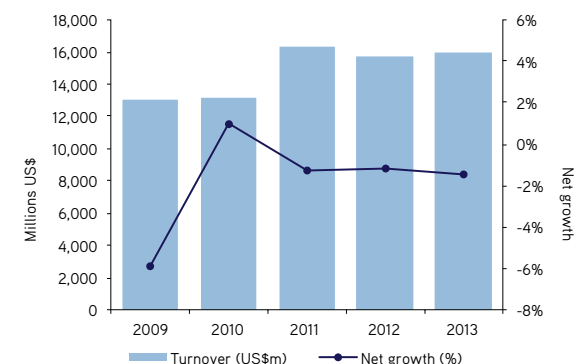
The downward trend in European turnover remains the region's, primary challenge; for the third year in a row, the value of the sector in the region declines: 0.4% in "gross" terms, but (1.4%) after inflation. Turnover reaches US\$ 16,005 million.

Of the EU 15, France, the Netherlands, Denmark and Luxembourg were the only markets to record net growth, ranging from 0.1% to 2.0%. Germany bucked the trend recording solid growth in recent years

too, but now suffers a small net decline of (0.5%) as the country sees competition from outside the market research industry intensify. The UK, Europe's largest market, reported positive growth (in local currency terms) for the first time since 2008, but this converts into a net decline of (1.4%) after inflation is taken into account. The Southern European markets – those that were hit hardest in past years – remain unable to bounce back, seeing market research turnover contract, from (1.3%, Greece) to (22.4%, Portugal). Overall growth for the EU 15 was (1.9%).

Europe - Market research turnover

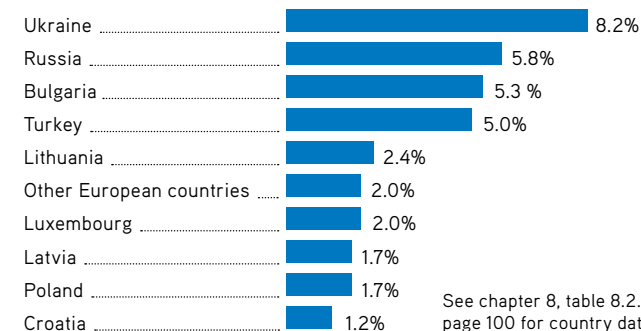
2009 – 2013 (US\$ millions)



The new EU member states returned to positive territory, posting year-on-year growth of 2.0%, and 0.4% after inflation. Poland, the largest market among the new EU member states (it is about twice the size of number two, the Czech Republic), returned to growth – up 1.7% – which is 3.1% higher than the European average. The uplift was fuelled by an increase in the number of research projects commissioned. In total 7 of the 12 new EU member states saw turnover increase; in contrast, Cyprus was the worst performing market with growth sliding (36.9%).

Fastest growing markets in Europe

Net growth rates in 2013 (%)



See chapter 8, table 8.2.3,
page 100 for country data.

Looking at the rankings of fastest growing regions, Ukraine, again, qualifies for the fastest-growing country, with sales climbing 8.2% (versus 24.8% in 2012). The country forecasted 18% for 2013, but political instabilities in Q4 of 2013 may have negatively impacted the market performance. Russia, Bulgaria and Turkey reported solid growth, too. Russia profited from higher investments in market research and expanding retail chains, while Bulgaria continues to benefit from its position as an outsourcing hub.

North America (Canada and the USA)

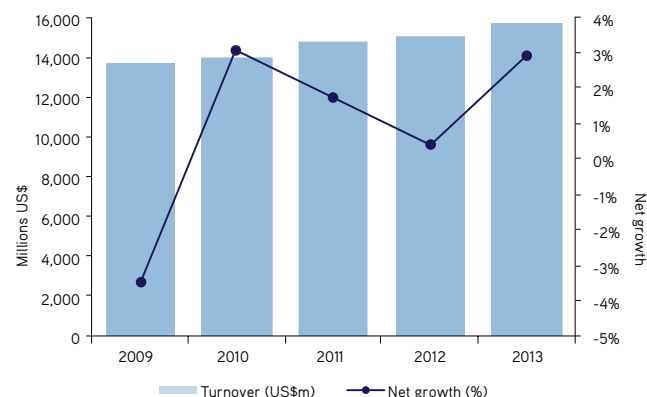
The North American continent takes the title of fastest growing region for the first time since 2000. The region recorded a fourth consecutive year of positive growth: 4.4% year-on-year, and 2.9% after inflation. Turnover for the region jumped to US\$ 15,705 million, an increase of US\$ 638 million on the previous year – and an amount which almost equates to Canada's total market size.

As a result, the region strengthened its global market share, which is up 2% to 39%.

More specifically, the USA continued its path of recovery, reporting 4.2% year-on-year growth (in local currency terms) and 2.7% after inflation. The local market research industry fared well under the improving US economy. Orders for qualitative research increased and market measurement and media audience research reached new highs. Canada saw even better results (relatively speaking), reporting 8.4% year-to-year and 7.4% after inflation, which helped drive the regional performance.

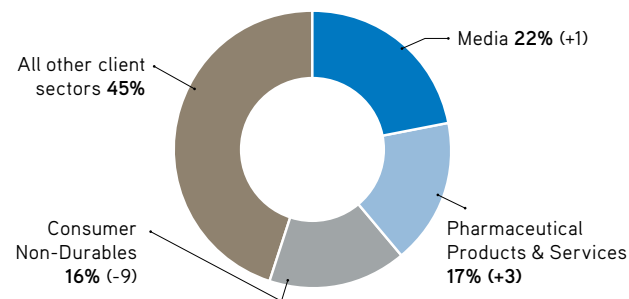
Looking at the top 3 client sectors for North America, sales to 'Pharmaceutical Products and Services' increased by 3%, and surpassed revenues from 'Consumer Non-Durables' (previously FMCG) which dropped 9%. With 22%, 'Media' is the single biggest client sector in terms of research sales.

North America - Market research turnover
2009 – 2013 (US\$ millions)



See chapter 8, table 8.2.4, page 101 for country data.

North America – Top three client sectors 2013 (%)



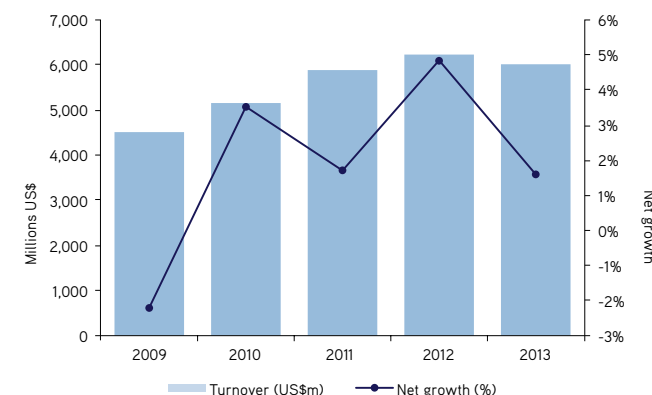
Percentage-point changes compared to 2012 are provided between brackets

Asia Pacific

Asia Pacific sees research turnover increase for the fourth consecutive year. However, it would appear that growth in the region has slowed down as the region posts its smallest increase since 2010. Research sales for the region amount to US\$ 5,998 million, reflecting year-on-year growth of 3.9% but the impact of inflation converts this into 1.6%.

Japan and China, who together account for 59% of the regional turnover, both saw their market performance slow down. Japan is close to stagnation posting just 0.5% growth (based on local currency) after the country experienced a strong revival in 2012. In US dollar terms, the country had to relinquish 1% of its global market share because of a weak Yen, and saw China advance, which in overall size is now just 9% smaller than Japan, whereas it was 26% smaller in 2012.

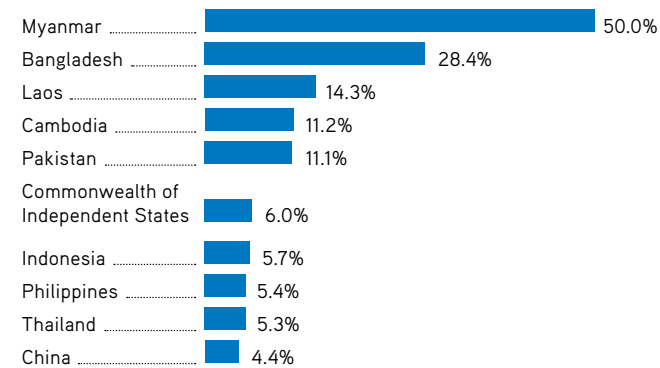
Asia Pacific - Market Research Turnover
2009-2013 (US\$ millions)



For China, growth slowed down from 11.2% in 2012, to 4.4% in 2013. Nevertheless, this steady performance is responsible for most of the regional growth. The country saw medium sized firms grow strong, but start-up companies struggled due to heavy price competition.

Just as in 2012, Myanmar is topping the chart of fastest growing countries, albeit from a small base; spending jumped 50.0%. Bangladesh, Laos, Cambodia and Pakistan all reported double-digit growth too (again from small bases). New research entrants fuelled growth for Bangladesh, though; clients wanting 'more for less' deteriorated the balance sheet. Pakistan profited from an election year in 2013, for which political parties initiated many large-scale research projects.

Fastest growing markets in Asia Pacific
Net growth rates 2013 (%)



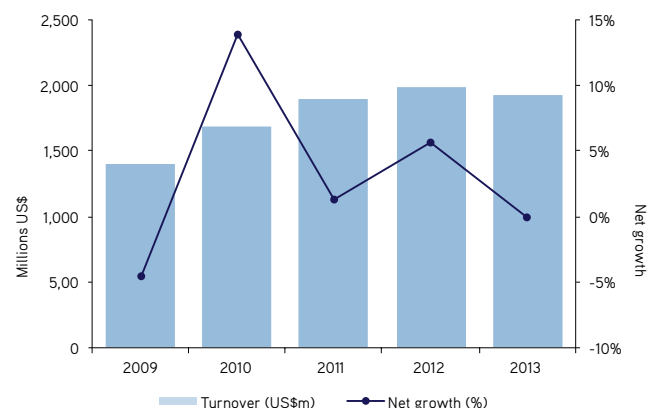
See chapter 8, table 8.2.5, page 101 for country data.

Sri Lanka, Vietnam and Hong Kong are among the markets most adversely affected in the region. The research markets of Vietnam and Hong Kong shrank (2.6% and (3.4%) respectively, with the latter losing research work to both China and Singapore. Sri Lanka posted a double-digit decline of (12.5%) which was impacted by budget cuts and a significant reduction in orders from international clients.

Latin America

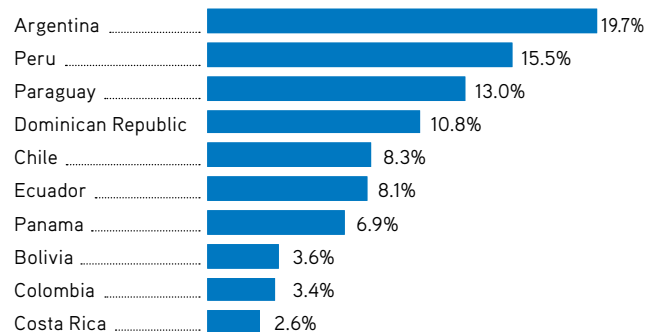
Latin America had to relinquish the title of fastest growing region it held in 2012. The region did record the strongest growth in local currency terms on a year-on-year basis: 6.6%, but this turns into a very small net decline of (0.1%) once inflation is taken into account. Turnover for the region totals US\$ 1,920 million.

Latin America - Market research turnover
2009 – 2013 (US\$ millions)



Fastest growing markets in Latin America

Net growth rates 2013 (%)



See chapter 8, table 8.2.6, page 102 for country data.

Of the 18 Latin American research markets measured, Mexico is the only country to report a decline in turnover, before adjustment for inflation. However, if we factor in inflation, 6 other markets experience a drop in sales, including Brazil, Venezuela, Uruguay, Guatemala, Nicaragua and Honduras. For example, Venezuela reported growth of 38.9%, the highest rate on a year-on-year basis, but the impact of very high inflation (40.7%) converts this into a net decline of (1.3%).

The Brazilian research market, which represents 38% of the regional sales, expanded by 3.2% year-on-year driven by online research orders in a non-election year, but contracted by (2.8%) once inflation is taken into account. Mexico, the second largest market, reported the highest decline (5.9%), which largely relates to their weak local economy.

If we look at the regional star performers, the strongest gains were experienced by Argentina, Peru, Paraguay and the Dominican Republic, all of which grew well above GDP levels. Argentina profited from increased orders for panel research, and Peru was lifted by a growing demand for online research, but with this move into digital, cost and price reductions come into play so the net impact on market value is yet to be fully appreciated.

Africa

The African research market contracted by (1.2%) with turnover dropping to US\$ 382 million. The region recorded substantial growth of 5.0% but, unfortunately, the quite significant effects of inflation have moved the region into negative territory.

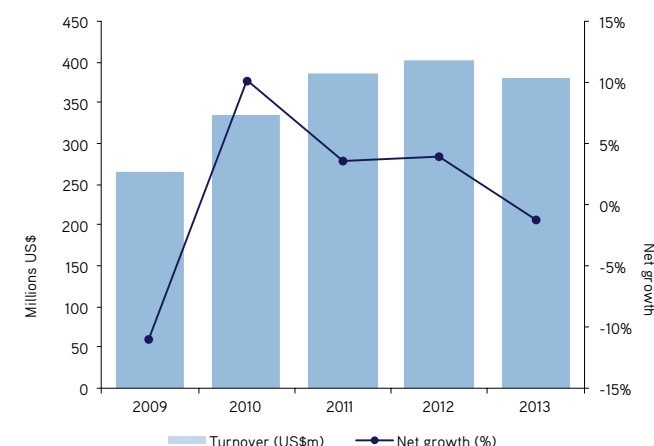
South Africa, by far the largest market, experienced a difficult year. Year-on-year growth (in local currency) fell from 10.8% in 2012 to 3.6% in 2013, which turned into a net decline of (2.0%) once high inflation is factored in. The country profited from product expansion, an increase in digital research (including mobile) and overall market and business diversification. However, growth slowed down because of tough market conditions, such as capacity constraints, client budget cuts, pricing pressures, and general political unrest and instability in the rest of Africa. In terms of US dollars, turnover declined to US\$ 219

million, which is in line with 2010 levels, illustrating the effects of a weakened ZAR (South African Rand) in 2013.

With net gains of 7.3%, West Africa, recorded another outstanding performance, although the region's market is still one-third the size of South Africa. The region's foremost growth market, Nigeria, profited – again – from foreign investments which will be further referred to in chapter 1.4. The country may even see better than expected growth once economic recovery in the USA and Europe accelerates, allowing Nigeria's international clients to intensify their spending behaviour.

East Africa grew 3.3% year-on-year but growth is negative (11.4%) once it is adjusted for inflation. Kenya, which fuelled the region in 2012 posting 13.7% net growth, could not keep the momentum and slipped back into negative numbers for the second time in three years, reporting net losses of (13.7%). This trend relates to a decrease in fieldwork and telecom research, price cuts, a shortage of qualified researchers, and competition from outside the market research industry (i.e. management consultancies who take over government work).

Africa - Market research turnover
2009 – 2013 (US\$ millions)



See chapter 8, table 8.2.7, page 103 for country data.

Note: these comments on the regional performance were all expressed prior to the EBOLA outbreak. Noting the travel, communications and commercial restrictions that have since been implemented, these will undoubtedly impact on the regions economic performance in 2014.

Middle East

The Middle East looked to have turned the corner as the region reversed last year's declines, posting 4.2% year-on-year growth, an apparent upswing which changes into a net decline of (1.2%) after inflation. This however, represents a positive development as this decline is not nearly as marked as the previous year (4.2%).

Behind the top line figures, the regional picture is very diverse. The Gulf Cooperation Council (GCC), which represents 57% of this region's sales, stayed strong and produced a third consecutive year of net increases, compensating for the (strong) declines elsewhere, that largely relate to the ongoing regional conflicts.

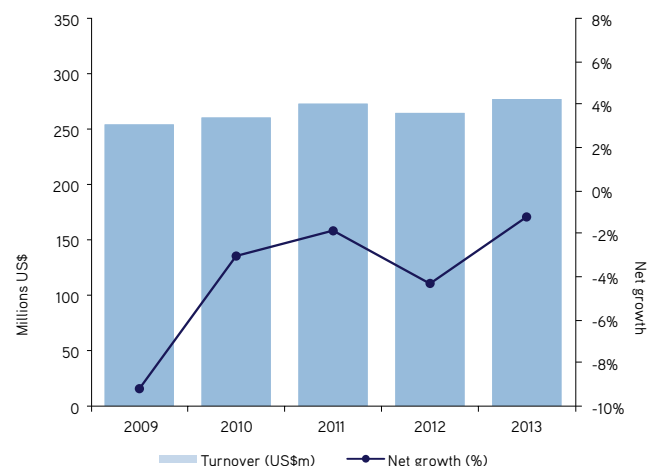
Egypt, for example, saw its market further contract by 8.0%. The local research market has been in decline since 2009, and had anticipated a rebound year following the election of president Morsi. However, serious instability in Q3 of 2013 disrupted the industry.

The Israeli market has stagnated for a couple of years now, and with the current state of affairs between Gaza and Israel, the economic prospects for 2014 do not look hopeful.

More positively though, Lebanon's research revenues grew substantially by 38.9% (from a very small base), which was supported by the start of the GfK MRME TAM panel, and higher retail audit volumes. However, it is worthwhile to note that international sales dropped due to continued unrest in the surrounding countries, like Syria.

For the first time, separate growth rates are now being reported for Iran and Iraq (which were previously grouped under 'Other Middle East') as more accurate information has become available. Iran shrank 11.2% as the commercial and cultural environment continues to be severely limited by the current regime. Neighbouring country Iraq plummeted 45.5%, with turnover decreasing to US\$ 5 million, from US\$ 20 million in 2010, as the US government spend has come to a halt, which represented approximately 80% of all sales. In addition, many research projects were stopped in recent years due to the deterioration in the security situation. ■

Middle East - Market research turnover
2009 – 2013 (US\$ millions)



See chapter 8, table 8.2.8, page 103 for country data.

1.3

FIVE LARGEST MARKETS

The market share of the five largest markets grew 1% to 70% in 2013, primarily driven by the market performance of the USA. The ranking order of the top five markets – which is compiled by using turnover in US Dollars – has remained unchanged.

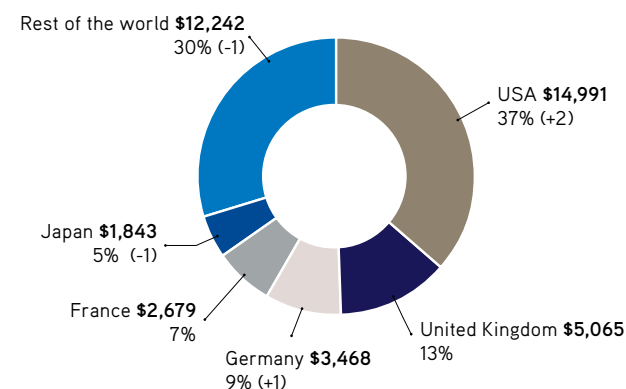
Looking back five years ago, it is interesting to recall that in 2008, the US share of the global industry dropped to 27%, when the economic crisis hit the market very hard. However, since that time, the country has consistently expanded its dominant position as the world's largest research market, and has now added a further two share points to its position in 2013, to now represent 39% of global sales. This significant recovery has been helped by the troubled European economies as they struggle to get back on their feet again, but it

should not detract from underlining the US market's increasing importance and relevance.

Second and third ranked markets – the United Kingdom and Germany – contracted slightly in local currency terms but kept their market share as the Euro improved against the US Dollar. In the case of Germany, this positive currency exchange represents an increase of US\$ 147 million for 2013, which explains the 1% increase in market share.

Conversely, Japan fell back 1%. Although the country recorded soft growth of 0.8% in local currency terms, when turnover is converted into US Dollars, their market shrinks by US\$ 391 million due to the depreciation of the Japanese Yen against the US Dollar in 2013. ■

Five largest markets - Market share 2013 (US\$ millions)



Percentage-point changes in share of spend compared to 2012 are provided between brackets.

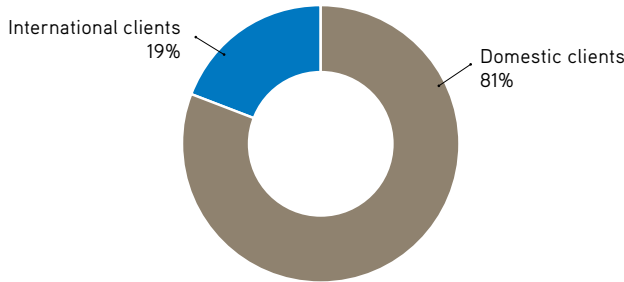
1.4 INTERNATIONAL SUBCONTRACTING, PROJECTS AND CLIENTS

The Global Market Research Report measures the value of work conducted by market research companies or institutes, at national, regional and global levels. In order to avoid double counting of international research turnover, any work that is subcontracted to research companies outside the home country has been excluded in the statistical analysis of domestic market research turnover. As a result however, it is now possible to review certain characteristics of the subcontracting sector.

Of the top 6 countries that subcontract the most (as a proportion of total spend), five

COUNTRY	MARKET SIZE (US\$m)	ABSOLUTE GROWTH (%) 2012/13	NET GROWTH (%) 2012/13
Hong Kong	120	0.8	-3.4
New Zealand	93	-0.7	-1.8
Vietnam	55	3.8	-2.6
Kenya	27	-8.8	-13.7
Georgia	3	-2.9	-2.4

Domestic vs international clients 2013 (%)



See chapter 8, tables 8.2.11, 8.3.1 and 8.3.2, pages 108-113 for available country data.

originate from Asia Pacific (Singapore, Georgia, Hong Kong, Vietnam and New Zealand), and one from Africa (Kenya). Singapore reconfirmed its position as main coordinator in Asia Pacific, attributing 45% of total sales to projects that are subcontracted to foreign countries. The other markets from the top 6 reported outsourcing levels ranging from 21% to 35% and, perhaps worryingly, all of these countries recorded minimal growth or a decline in local currency for the year 2013.

If we expand the picture out to other regions, a couple of countries stand out. In Europe, Belgium reaches the highest outsourcing level of 17%, whilst Argentina (Latin America) and Lebanon (Middle East) subcontract 20% and 16% to research companies outside the home country. In absolute terms, Brazil takes the lead having allocated the largest amount (US\$ 128 million) to work in other countries.

Turning this analysis around and looking at sources of turnover, i.e. the recipient countries of international work, there are no changes, at least not at global level. From a country point of view, the LatAm markets of Honduras, Uruguay, Guatemala and Nicaragua rely most heavily on international clients, which represent 60% to 80% of local sales. In the research hubs of Nigeria and Bulgaria, international clients were not reluctant to spend either, being responsible for maintaining growth in these countries, both of which reported net increases of 5.3%. However, for the majority of countries, the market is driven by local research orders. ■

1.5 A REVIEW OF THE MARKET LEADERS

The top six companies account for 45% of research revenues in 2013. The composition of the list includes one major change. IMS Health moved up to third place, following its listing on the New York Stock Exchange in April 2014, after which the company reported full-year revenues. As a result, Ipsos, GfK and Gartner (which was added to the list last year) moved to 4th, 5th and 6th place respectively. Looking at the individual companies, performances vary considerably.

Nielsen again tops the ranking, accounting for 14% of global research sales. The company will likely further reinforce its position with the successful acquisitions of Arbiton and Harris Interactive (which ranked 9th and 20th in the 2012 Top 25). The company reported a 15.9% rise in Q2 2014 revenues, on a constant currency basis. Excluding the impact of acquisitions, the company posted 5.2% growth.

Kantar made by far the most acquisitions in 2013: six in total, but these were not as sizeable compared to Nielsen's activities.

More recently, Kantar's Worldpanel expanded to Egypt, Nigeria, Kenya and Ghana. WPP saw its revenues for 'Data Investment Management' increase by 3.6% (on a constant currency basis) in Q1 2014. Interestingly, turnover for all regions except for North America (2013's global growth driver) rose in Q1.

Ipsos returned to growth in 2013, reporting 0.8% organic growth. However, the company has stalled in the first half of 2014 since growth was "very disappointing" in the Americas. Ipsos notes that this poor performance will likely prevent them from reaching their targets for 2014.

GfK, accounting for 5% of global research sales, reported organic growth of 0.8% for 2013 too, but the company is down 1.6% in the first half of 2014. This "temporary" sales decrease should be seen in the light of GfK's 2014 transformation with "enhanced global integration and a more extensive digital product offering", GfK CEO Matthias Hartmann explains. The company expects organic sales growth to be in between -1.5% and 0% for the full year 2014.

Gartner, newcomer in last year's Global Market Research Report, achieved very strong growth over 2013, and has yet again demonstrated its competitiveness, reporting a sales increase of 17% for Q2 2014. ■

Market share of top six companies 2012 versus 2013

COMPANY	2012 market share (%)	2013 market share (%)
The Nielsen Company	14	14
Kantar	10	10
IMS Health Inc.	6	6
Ipsos SA	6	6
GfK	5	5
Gartner, Inc.	4	4
Rest of the market	55	55

See Chapter 6 for available company data.

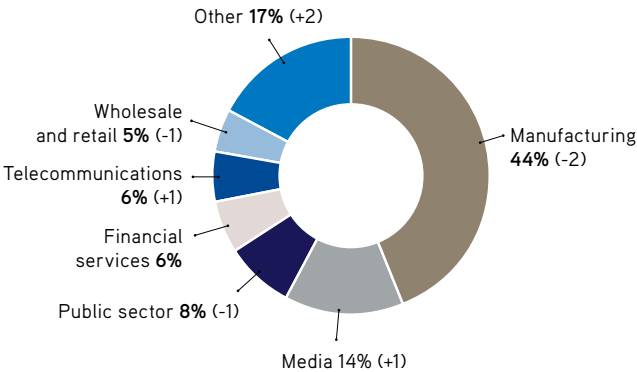
1.6 SPEND BY CLIENT TYPE

At the client level, the largest demand for market research still comes from the Manufacturing sector. This sector accounted for 44% of global sales in 2013, down 2% from the previous year, but continues to drive the market research industry. The Media sector invested slightly more money than in 2012, with sales increasing by one

percentage point to reach 14% of total client spend. Other relatively large spenders are within the public sector, telecommunications, wholesale and retail, and financial services. Together they represent one-fourth of global research expenditures.

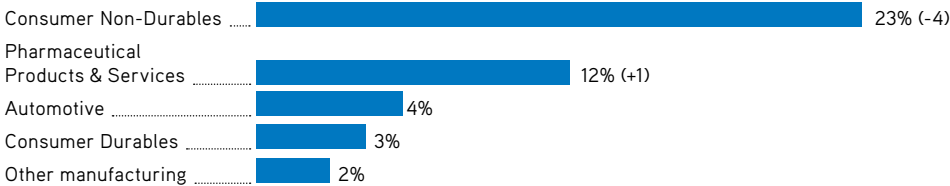
Looking at the subgroupings of the 'Manufacturing' sector, there is little change on previously observed patterns. Clients within 'Consumer Non-Durables' (previously FMCG) were responsible for the highest demand but research revenues for this sector fell 4% to 23% in 2013. Number two, 'Pharmaceutical Products & Services', is up 1%, and now represents more than one-eighth of global revenues. ■

Spend by client type
2013 (%)



Percentage-point changes in share of spend compared to 2012 are provided between brackets.

Breakdown of manufacturing clients
2013 (%)



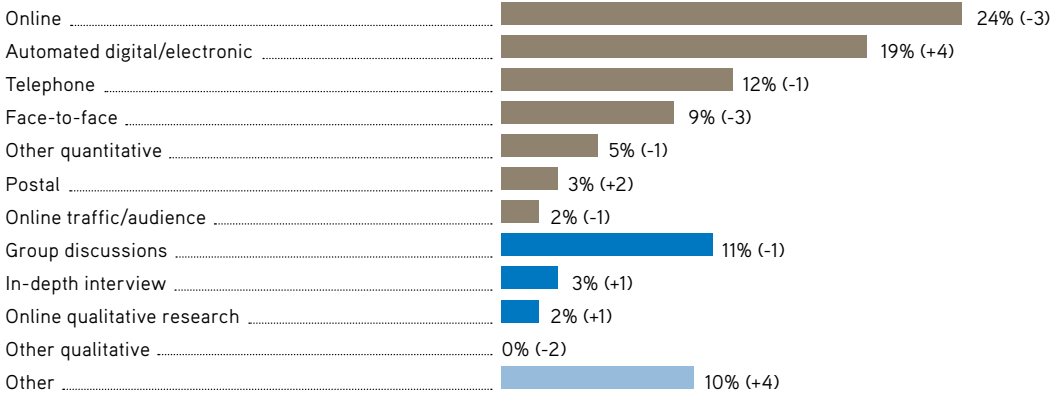
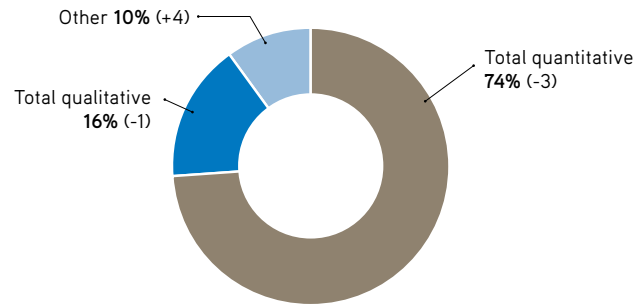
See chapter 8, tables 8.3.3, 8.3.4 and 8.3.5, pages 114-119 for available country data on spend by different client sectors.

1.7 SPEND BY RESEARCH METHOD

There are a few interesting developments in terms of global research spend by data collection method. Other types of research (i.e. desk research and secondary analysis) have gained ground in 2013, and grew 5% to 11%. This comes at the expense of both quantitative and qualitative research, whose revenues fell 4% and 1% respectively. Quantitative research still represents close to three-quarters of all research work done.

The proportion of online research has been growing steadfastly over the last couple of years, driven by mature research markets. However, in 2013, this has taken an unanticipated turn; revenues for online declined 1%, to 28% in 2013. Part of the decline can be explained by the USA. Their local share for online quantitative dropped to 21%, from 31% in 2012, while automated digital/electronic grew by 7% to 35% of total sales fuelled by increased orders for media audience research. Furthermore, the decline in online's overall share also looks to be the result of increased global price competition. Remembering that this report measures the value of research, a decline in price can result in a drop in share. This trend of price reduction is substantiated by ESOMAR's Global Prices Study 2014 Report, which details that median prices for the online modalities (ie. online U&A study, Tracker study & Advertising test) have all registered overall declines over the last four years, ranging from 2% to 12%.

Spend by research method
2013 (%)



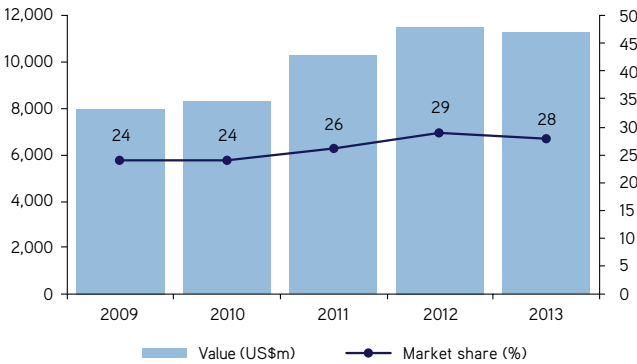
Percentage-point changes in market share compared to 2012 are provided in between brackets. Other quantitative research includes mainly syndicated services for which breakdowns are not available. Other qualitative research includes ethnography and other methods for which breakdowns are not available.

In addition, it is not just the USA for which online revenues take a dip. Of the Top 7 markets with the highest usage of the internet (in relative terms), Japan is the only country to report an increase in revenues. Bulgaria and Sweden were up 10% and 5% in 2012, but had to report small declines in online revenues for 2013; and they will likely look to compensate for this revenue decline by increasing volume in the coming period. Germany no longer qualifies for the Top 10 seeing online quantitative revenues drop 5%, and is

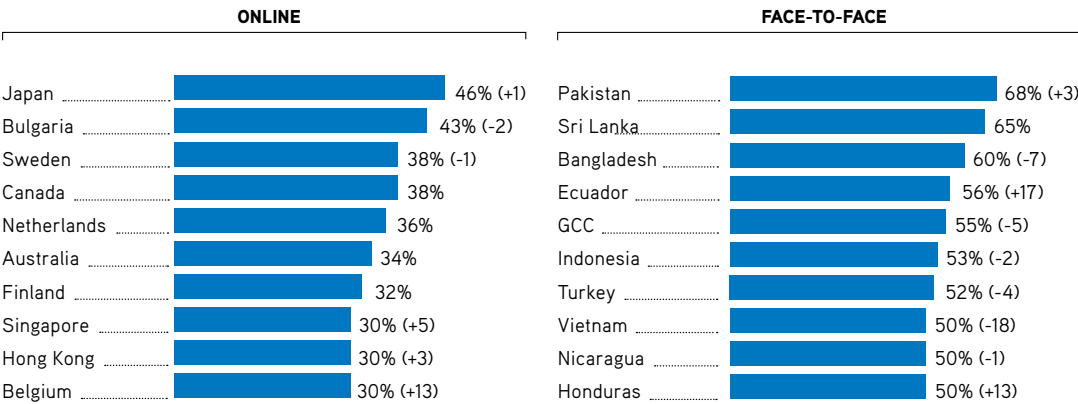
surpassed by newcomers Singapore, Hong Kong and Belgium.

At project type level, a couple of movements can be identified. Revenues for Market Measurement and Media Audience Measurement increased 4% and 5% respectively, which is largely boosted by the USA where these project types reached new highs. Conversely, global sales for 'Other to Business-to-Business studies' dropped 7%

Global online research spend 2009-2013

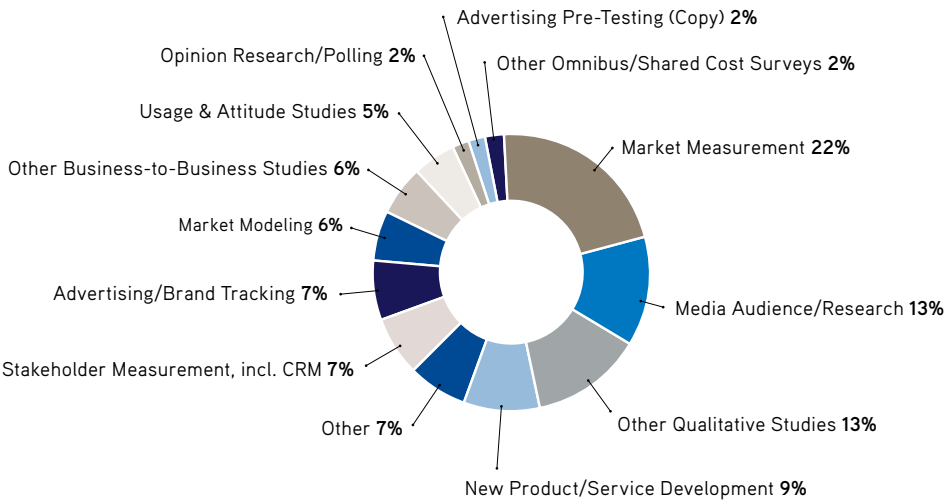


Online research versus face-to-face spend as a % of total spend Top 10 countries in 2013



Online quantitative research only, excluding online traffic/audience measurement and online qualitative.

Spend by research project type 2013 (%)



See chapter 8, table 8.4.4, pages 126-127 for available country data and project type definitions.

1.8

OUTLOOK FOR 2014

Confidence in the health of the market research industry appears to have strengthened; 82% of the countries that provided forecasts expect their local market to grow in 2014, compared to 60% in 2013. Further underlining this rejuvenated optimism, only 9% of the responding countries anticipate a decline in 2014, whereas 19% had forecasted a decline in 2013.

From a regional point of view, the optimism is most apparent in Asia Pacific, with eleven of the fourteen markets expecting an increase in research turnover for 2014. Two countries forecast double-digit growth: Indonesia and Pakistan, who believe the markets will likely be lifted by increased spending (Indonesia) and polling research (Pakistan).

Japan is expecting growth of 3% in local currency terms. The IMF recently increased their 2014 Japanese GDP growth forecast by 0.3% to 1.6%, following Japan's 'unexpected' strong performance in Q1 of 2014. However, this decelerates to 1.1% in 2015 given the 'planned unwinding of fiscal stimulus', the IMF notes. To put this in context: China, the region's second largest market, has been projected with 7.5% economic growth in 2014 and may exceed Japan's research turnover in the coming years.

In Latin America, positive growth expectations prevail too. Of the twelve measured markets in Latin America, eight foresee an increase in turnover, three (including Mexico) predict no change, and Venezuela is the only country that anticipates a decline for 2014 as it suffers from high inflation. Peru and

Uruguay think they may be among the region's fastest growing markets this year. Both countries expect to see high demand for opinion polls in a year of local elections. Brazil, the region's largest market, assumes soft growth of 3%, driven by government spend and research surrounding the FIFA 2014.

The prospects for Europe now appear to be more promising but it remains unsure whether the region is able to counter last year's persistent declines in light of the region's political tensions and slow economic recovery - aside from continuing client budget cuts and pricing pressures, which do not seem to have faded away. Of the twenty responding countries, twelve expect (relatively small) increases in research turnover; four countries anticipate a decline, and the remaining four believe the current status will be maintained (i.e. no change).

For the first time, the IMF is projecting positive - but small - economic growth for the Southern European markets (including Greece, Italy, Portugal and Spain), and expects their local economies to pick up further in 2015. The United Kingdom, Europe's largest market, saw GDP growth return to pre-economic crisis levels in 2014 and is hoping to profit from greater confidence in the UK economic recovery. However, the country does note that pricing pressures continue, with contract bookings becoming shorter.

The USA, the world's biggest single research market, is presumably expecting steady growth in 2014 as it sees business conditions improve - despite a weak first-quarter outcome which prompted the IMF

to scale back their 2014 growth forecast with 1.1%, to 1.7%. Nevertheless, the MRA's latest Research Industry Index (RII), which tracks the health of the research industry in the USA, is showing the strongest twelve months since the study was first conducted in 2007. In addition to that, our US country representative anticipates 6% growth for the year 2014, stimulated by higher spending on traditional market research needs, with strong investments in media, healthcare and technology.

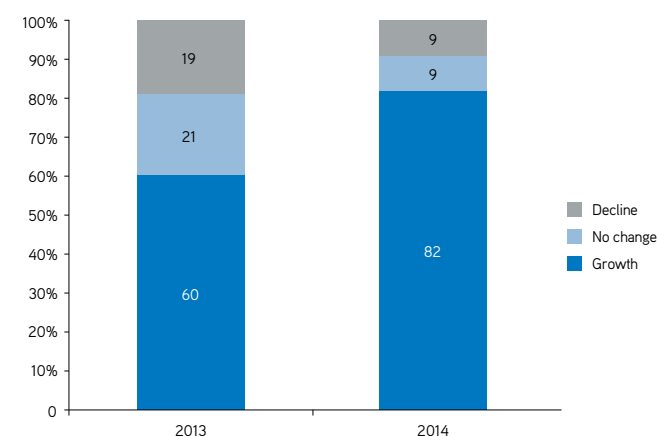
In the Middle East, optimism persists but regional conflicts may put a hold on client investments. Egypt anticipates registering 8% growth for the year 2014, which would bring the country back to growth for the first time since 2008. The country hopes to fare well under the restored stability and improved bilateral trade with other Arab countries, but high inflation may weaken the outcome. The regional performance could be further

lifted by the GCC and Lebanon, both of which foresee moderate growth of 5% and 7% respectively. In contrast, prospects in Israel do not look very hopeful given the conflict with Gaza.

In Africa, the outlook for 2014 remains positive. South Africa, Nigeria and Kenya - the region's foremost markets - expect revenue increases of 6%, 5% and 16% respectively, which will largely be driven by a broader client base, increased spend, economic growth, technological developments, and growth for innovative approaches. However, political instability, capacity constraints and the consequences of the EBOLA outbreak may weaken the outcome.

For the full year 2014, ESOMAR believes that global industry growth of between 3% and 4% (before inflation) is possible, considering the latest signs of economic recovery for some of the world's largest research markets.

Expected performance of the market research industry 2014 (weighted predications) (%)





2. BEYOND BOUNDARIES

Some of our industry's most influential thought leaders discuss how the world has changed from a macroeconomic perspective, and what that means for market research demand. Includes study results on the size of the broader market research industry.

2.1

PRESSURE AND INSTABILITY

Welcome to the new normal

Phyllis Macfarlane and Didier Truchot

Political uncertainty, security concerns and economic instability continue to weigh heavily on the world's business community, and these factors are adding pressure on the market research industry to work smarter and faster in an increasingly competitive market. The global economy looks to be picking up, albeit slowly, with growth in the second half of 2013 strengthening over the previous year, and the outlook for 2014-15 being even brighter. Growth is forecast by the International Monetary Fund to be around 3.7 per cent this year, rising to 3.9 per cent in 2015. But fragilities remain, not least because of heightened hostilities in the Middle East, and growing international tension over Russian activity in Ukraine. Ipsos founder and co-president Didier Truchot says the business world has yet to fully recover from the economic shockwaves that began in 2009; restructuring is still ongoing, and there's a general focus on rationalising and controlling costs rather than investment and expansion. "The corporate world has

become very risk averse," he says. "We're operating in a world which is growing at a much slower pace than before the financial crisis, not just in the developed world but also in developing markets. Innovation is being used to streamline a business rather than as leverage for growth. The taste for adventure just isn't there."

Phyllis Macfarlane, also a veteran of the industry and currently global training director of GfK, says the effect of changing investment patterns on the research business is difficult to measure. This is because gains in efficiency and pressure on prices have an impact on overall revenues, which is how the industry is generally tracked. At the same time, low pricing in emerging markets means revenues look small compared to Europe and the US, but the volume of research being conducted is huge. Chinese research revenue is only 12 per cent of that in the USA, for instance, but is about a third of US volume.

Appetite for information

The most significant influence on growth in demand for research, Macfarlane says, comes from realising the sheer scale of opportunities in developing markets and the appetite with which clients are seeking to understand people in these markets. At the same time, the rise of technology-based companies is putting into sharp focus the true importance of brand and reputation, and the potential for technology to disrupt not just tech-focused industry fields but also financial services, retail and media.

we've seen for several years now. But I also see an interest in new methodologies – in the application of the newer consumer sciences like behavioural economics and prediction theory – and in researching the effect of new media. Clients are hungry to understand the current thinking and to experiment. So, yes, I see market research re-inventing itself – and with a new self-confidence. But that growth is countered in overall market terms by a reduction in traditional revenues."

Despite the pressures on clients and, in turn, on their research suppliers, there is no shortage of demand for business insights. In fact, they're possibly sought out with greater urgency than before. "We're in a period where information is more important than ever to our client," says Truchot. "The industry has to challenge itself, and it's not just the market research industry but any activity providing business services or providing products to consumers. Things have to change, because we're in a period of transition."

'I see market research re-inventing itself – and with a new self-confidence'

"I still see a game of two halves, as they say," Macfarlane explains. "I think the big international trackers are continuing to be consolidated and squeezed by procurement departments – a pattern

*‘One way or another,
somebody will be bold
and make a change, and
everybody will follow’*

**Security, speed,
simplicity and substance**

Truchot, whose company will mark 40 years in business next year, says the current conditions require researchers' energies to be directed into four key areas. The first is to give clients security – security that their projects will be delivered on time, free of errors and in compliance with the regulations – something that's easy to promise but increasingly complex to deliver. The second area is speed. “We're in the Google world, and a world where many decisions need to be made very quickly, so we've been used to looking at

something in 20 days: we were looking for 18 days, then 17 days, and so on. Now I think we need to be more revolutionary. So how can we deliver more services overnight and move from weeks to days? Of course, that creates a lot of operational challenges.”

The third part of the strategy is to focus on simplicity. Delivering simple, easily digestible and easily actionable research helps accomplish the objective of greater speed and also helps businesses managing multiple and varied stakeholders to efficiently reach agreement on the way forward. The fourth and final area is to deliver substance. “For each of our projects, we need to be sure we're creating some set of information – insights that will bring to our clients an output where we can really learn something – not just providing information for the sake of providing information.”

speed as an area for continuous gradual improvement. That's no longer enough,” says Truchot. “Let's say we were doing

Both Truchot and Macfarlane are bullish about prospects for the year ahead, for researchers and their clients. “What's

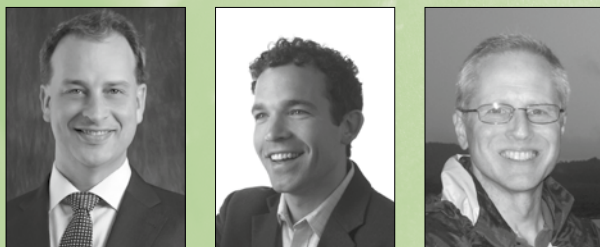
most exciting is seeing the market research industry revitalised by new thinking, doing what we always used to do: taking the best of the new scientific thinking and technology, and adopting it into practice,” Macfarlane says. “My biggest concern is that we might throw the baby out with the bath water and forget all the knowledge and good practice we have accumulated as an industry.”

Truchot is confident that the current malaise will be remedied and business confidence will return. “One way or another, somebody will be bold and make a change, and everybody will follow. I've always been very optimistic, and I see no reason to change now.” ■

*‘Not just information
for the sake of providing
information’*

2.2 GROWING FOOTPRINT

The quandary over expansion



Jim Sailor, Nick Nyhan and Jeremy Pace

The research industry has grappled for some years with a dilemma over its future: should it reach out and embrace as partners the new businesses (and techniques) that have germinated on the fringes of the sector, or should it draw a clear line between an established, respected industry and new players who often don't even see themselves as researchers?

'It's hard to protect your oil field in the age of data fracking'

For clients, this question has largely become an irrelevance. They are investing significant proportions of their budgets with suppliers of data, information and analysis that are not part of the traditional research industry. For them, if someone provides a workable, efficient solution to a business problem, they usually

get the green light. But, of course, in a world of increasing transparency, clients want not only the right answers but partnerships of integrity in compliance with the prevailing regulations. So what still counts as market research, and what remains outside?

Jim Sailor, general manager ASEAN region with IDC, says business perceptions on what market research is – and what it isn't – vary by industry but generally align with one of two views. "One would be that 'market research' is getting bigger and more important, and data is coming in from all angles – online, mobile, internal, external, structured, unstructured and so on – and that there are now huge opportunities to use that in order to take understanding and knowledge to new levels," he says. "The other view is that 'market research' is obsolete and that, in this day and age, anyone can gather data and information without having to go through the trouble and expense of working with a research agency."

*'It's not about the data;
it's about the deep
understanding and learning'*

The whole story

Though it sounds counter-intuitive, it's possible that these two alternatives are not mutually exclusive. Nick Nyhan, digital coordinator and strategist for Kantar, says the market research industry needs to adjust to slightly different rules. "To use an oil analogy, it's hard to protect your oil field with an old business model in the age of data fracking, with fracking finding all these new data sources," he says.

"All opportunities can be challenges if you're not nimble enough to adapt." And some companies will fight change, continue to do surveys, get plenty of work and will be able to say, 'I told you so.' "They're not wrong," Nyan says, "it's just that that's not the whole story."

Where the boundary between what is and what isn't research lies is almost of as little consequence to individual research houses as it is to clients, from a commercial point of view at any rate. Many established names in research now

offer a far broader range of services than they did a few years ago, including some of the services that for a time were viewed to be on the outside. After all, it's only in the past couple of years that, in sizing the industry, ESOMAR has included advisory services such as Gartner, Mintel, Euromonitor and Forrester.

But for the industry as an entirety, where exactly that line is drawn remains a vital consideration, particularly as many governments look to tighten regulations on personal data protection. "If the industry doesn't define itself – and if companies don't come into line with industry guidelines – then we are inviting governments and regulators to lump market researchers in with other businesses that use data in less reputable ways," says Sailor.

Jeremy Pace works in the sensory and consumer preference network at Nestlé. He has seen the industry call itself consumer research, market intelligence and consumer insight. Along with the

name, the service that clients require of researchers has also evolved. “The industry is at risk, because a lot of what we’ve charged for is data, and then we try to increase the revenue by adding value,” he says. “Now data is very easy to get ... it’s becoming a bit like publishing, in that there’s not that capital hurdle that prevents people from becoming publishers.” To prove their worth, researchers have to demonstrate that extra layer of service and analysis that justifies their rates, he says. “It’s not about the data; it’s about the deep understanding and learning.”

Clients are pushing to reduce the number of research suppliers they use, but they want those remaining partners to draw on a greater range of information sources. They also want greater emphasis on the data of ‘now’ – Twitter feeds, for instance – but, as Nyhan points out, much of the meaning of real-time data only comes from putting it into context – often the context of many years of other research. “They still need people telling

a narrative; they still need surveys – even the great Google is doing surveys – and you still need to look at the long term. The thing that unites us all is there’s still room for market researchers as data chefs – helping pick the ingredients and tell a story and prepare the meal. It’s just the sources are more diverse, and we do it in different ways. That means that the critical skills in the market research industry are more in demand than they were before; it’s just that there’s more competition.”

What’s in a name?

From time to time, there’s talk of the need to rebrand this industry with a name that better represents the broadening nature of what it provides. Yet there’s no consensus on what that new name should be (or even the need to do away with the current one).

“I think it’s still the best name for what is a very broad industry, but it’s just an umbrella that we work under,” Sailor says. “Information, analysis, research, thinking ... I think these terms are

becoming interchangeable in describing what we do.”

‘We need to get on with it – and don’t worry about what you call it’

Nyhan feels the name debate is an unnecessary diversion: “Sometimes researchers tend to get caught up in analysing situations instead of just getting on with it, and I think we need to get on with it – find insights, tell stories, drive conversation with data, and don’t worry about what you call that. The music industry is a good example of the evolution taking place ... and I don’t think the music industry has changed what they call themselves.”

In order to measure the value of this ‘very broad industry’, ESOMAR started a study in 2011 in cooperation with Outsell Inc., a US based market intelligence provider. The initial scope of work aimed to:

From the start in 2011, Outsell and ESOMAR identified seven sub-segments that related to the wider ‘Business Intelligence’ sector. These seven research sub-groups were measured at an incremental value of close to US\$ 10 billion in 2010, which indicated that the market research industry could be 20% bigger (at that time) by allowing other business intelligence providers into the traditional research industry.

Following lengthy discussions with the GMR Sounding Board, it was decided to update the definitions for ESOMAR’s annual industry survey on the 2012 research industry to incorporate revenues that relate to the ‘Advisory Services’ sector – representing consultancies such as Gartner, Forrester, International Data Corporation (IDC), Mintel and Euromonitor. This broadened approach to measuring research turnover added a minimum of US\$ 5 billion to the global market value of the market research industry.

1. Obtain a first reference point in terms of how much larger the expanded research market would be compared to the value of work for the traditional market research activities;
2. Identify sub-segments of research, including market size information, trend data and growth comparisons;
3. Review and broaden the basis on which ESOMAR’s annual industry survey is carried out.

*New categories add
US\$ 12.5 billion to research
related revenues*

Last year the definitions of the broader market analysis were also further refined, in cooperation with Outsell, and three new sub-segments were identified for further examination: ‘online analytics’, ‘management consultancies’ and ‘web and social media research’.

This year’s study results on the 2013 broader research market suggest that these three groups together account for another US\$ 12.5 billion of research related revenues.

Estimated market size of the expanded global research industry

US\$bn	2012		2013		2012/13
	GMR	OUTSELL	GMR	OUTSELL	NET GROWTH
Traditional market research	39.7	35.7	40.3	37.1	
Online analytics	—	6.5	—	7.2	10.1
Management consultancies	—	4.8	—	5	3.6
IT & telecom research	—	3.3	—	3.6	7.5
Marketing reports & research	—	2.9	—	3.2	9.6
Social media communities	—	2	—	2.2	12
Web traffic measurement	—	0.92	—	0.99	7.6
Sample & panel providers	—	0.88	—	0.92	4.5
Media monitoring	—	0.54	—	0.54	0.2
Survey software	—	0.39	—	0.44	16.7
Web and social media research	—	0.28	—	0.31	10
Incremental turnover sub-segments	—	22.51	—	24.4	8.4
Total value expanded market	—	58.2	—	61.5	—



Adding the initial seven sub-segments that were identified earlier in 2011, the incremental turnover now equates to around US\$ 20 billion in 2013, excluding 'IT & Telecom Research' which includes many of the 'Advisory Services' companies that were already added to ESOMAR's market sizing survey on 2012.

security, sports equipment, watches and crop protection chemicals, which all generate global annual sales of around US\$ 60 billion. ■

The total value of the 'business intelligence' market could be as large as US\$ 61.5 billion

Using this expanded view of the industry, the total value of the 'business intelligence' market could be as large as US 61.5 billion, which is more than 50% bigger than the US\$ 40.3 billion that ESOMAR has now measured for 2013. This puts the broader 'business intelligence' market on an equal footing with the global markets for cyber

2.3

MOVING ON, MOVING UP

In these straitened economic times, the general business appetite for adventure has dissipated. The focus for many companies has shifted from pursuing a course of continuous reinvestment to delivering dividends to investors. But with competition ever keen, the need to innovate and streamline remains strong, and the demand for information and insight that can provide a competitive advantage is similarly robust.

In this climate, it's vital that researchers cover the basics of their service well – providing the so-called hygiene factor, ensuring work is accurate and on time. But it also requires them to think differently, providing a sharper, more analytic service that makes its value clearly evident to the buyer. This way, they will be well equipped not just to ride out the current period of uncertainty but also to ride a wave of growth when widespread confidence eventually returns.

Provide a sharper service that makes its value clearly evident

For researchers, work is increasingly coming from different geographical sources, and while revenue tables showing income by country don't necessarily reflect this (because labour costs vary so significantly), developing markets now account for a much greater volume of research than in previous years. There are huge opportunities in these markets for goods-and-services providers that can tailor their proposition or develop new offerings to suit these increasingly affluent consumers and their complex, varied tastes.

How much the industry should expand and include new approaches to business insight has always been a challenging question. To those outside, it seems a curious thing to wonder about, yet the industry has a reputation and track record to protect and a future to secure at a time when consumer and regulatory concern about personal privacy is high. Whether the broader industry continues to go by the name 'market research' or calls itself something perhaps more technology- or analysis-focused seems less important than having a clear sense of self and direction. As has already been evidenced, clients want substance: great, reliable insights and information that they can turn into action. What the source of all of that is called matters very little. ■

Margins on routine research that used to be the industry's bread and butter are being squeezed, but the upside of this evolution of information is that clients are willing to pay for techniques and analyses that give them a deep and truly insightful view.

3. AFRICA & LATIN AMERICA

A wide range of industry experts share their views on trends & developments in Africa and Latin America; what's driving growth and what challenges have to be overcome

3.1

SEEKING GREENER PASTURES

Recession in the developed world has usually been accompanied by the hope that dynamic, fast-growing developing markets will pick up the slack, providing either the consumption required to keep businesses ticking over or more efficient routes to market, thus improving margins. Often this optimism has fallen short of reality, and in the current, still-shaky recovery from the financial crisis that rocked the world in 2008, the expectation that the BRIC markets would counterbalance flat-lining GDP growth in the US, the Eurozone and Japan has for the most part failed to materialise.

have pointed out that it used to be the case that when the US sneezed, other economies caught a cold. This has now been reversed. Business models that relied on cheap manufacturing in China to service an appetite for goods in America – or even those that sought to tap into the burgeoning Chinese consumer market – are coming unstuck. China's economic growth, while still the envy of Europe and the US, is slowing. India is growing at its slowest rate for almost 25 years, and Brazil is struggling to post any growth at all (IMF forecasts put growth for this year at just 1.3 per cent). Meanwhile, Russia was on the brink of recession even before the pressure over its involvement in eastern Ukraine was stepped up. In this climate, the search for new markets offering exciting new potential for growth is ever more pressing.

The ability to help expanding businesses understand consumer dynamics in these regions offers great opportunity – but no easy ride

Global growth is now forecast by the International Monetary Fund to be a lacklustre 3.4 per cent for 2014 – 0.3 per cent weaker than in projections made in April; it is expected to hit 4 per cent in 2015. Geopolitical tensions are running extremely high, and many financial markets are volatile. There are some voices in the US predicting that the world's biggest economy is in for an even rougher ride next year, as its growing reliance on exports makes it increasingly vulnerable to external fragilities. Some

In this chapter, we take a look at two regions, Africa and Latin America, that are home to some of the most promising, fast-growing and yet challenging markets in which to do business. Both these regions contain several of the so-called 'Next 11' growth markets, and both have large and increasingly affluent populations that are keen to spend and express themselves in new ways. For the market research industry, the ability to help expanding businesses understand consumer dynamics in these regions offers great opportunity. But there is no easy ride here: civil war, talent shortages and even occasional crocodiles all come with the territory. ■

3.2

PROGRESS UNDER AFRICAN SKIES



Sifiso Falala and Mamapudi Nkgadima

The rise of Africa has been a long time coming, but there is much evidence that its star is finally in the ascent. Countries such as Rwanda, Mozambique, Ghana and Ivory Coast feature among the 20 fastest-growing economies in the world and, in the past ten years, World Bank data shows that gross national income per capita in sub-Saharan Africa has risen 152 per cent (compared to the global average of 61 per cent). Yet progress is rarely simple, and Africa

‘The risk is a lot smaller than some people actually realise’

remains a continent of extremes – one in which every few steps forward are often accompanied by one tragic step back. For every newly arrived member of the middle classes, many more people remain mired in true poverty or live under the threat of civil unrest.

So while economies on the whole have strengthened, and nations have stabilised (making markets within the region attractive investment destinations) there remains vulnerability – not just to fluctuating world demand for the raw materials that have fuelled much of the recent growth, but also to corruption and terrorism. Growth has been uneven, so while demand for the trappings of luxury has been rising, those at the bottom of the income pyramid number in the hundreds of millions. Similarly, while mobile connectivity has proved transformational, other elements of national infrastructure often remain poor.

Weighing up the opportunity

Against this backdrop, multinationals are looking to tap the nascent opportunity this land represents, and national African brands are seeking to expand beyond their borders. Sifiso Falala, CEO of Plus 94 Research, says businesses are aware of the risks but have

confidence that things are on the up. “I’d say the risk is a lot smaller than some people actually realise,” Falala says. “Social challenges, political unrest and civil wars are not at the same level we experienced 10 to 15 years ago. Africa is stabilising politically and has accepted the virtues of being democratic – and to a large extent the virtues of having a market economy – which is why there’s such heavy investment.”

Recent elections in South Africa and Malawi are indicative of the population’s changing demands. “We have suddenly woken up to the fact that our governments have to deliver, and in order to do that they need to create jobs, and in order to do that they have to attract investment – so the climate has to be right. The risk is there, but one investment leads to another.”

Financial services providers in particular have significant room for expansion: in South Africa, 75 per cent of the population has a bank

account, but across the whole of Africa, that figure is closer to 25 per cent. Healthcare, technology, fashion and other sectors that give people a route to self-expression are all on the rise, Falala says.

“As Africans are very conscious of status, even in rural areas you’ll find some of the latest Samsung phones and iPhones; they’re very keen on purchasing products that express who they are. We probably have more German cars than they have in Germany.” As people move up the socio-economic ladder, they look to express themselves in new ways, so there’s growing demand for cultural experiences such as theatre, dance and dining out.

Mamapudi Nkgadima, managing director of African Response, says the expansion of financial services brands, telecommunications companies and retail brands are providing the strongest opportunities for market researchers, as businesses that have a



Shirley Harding

strong base in their domestic market, particularly from Kenya, Zimbabwe and South Africa, expand across the rest of the continent. “This has happened in the past, but it’s becoming much more widespread,” Mamapudi says.

“For clients, the biggest thing is really understanding the dynamics of each market, understanding the different personas and nuances of each market. In marketing, we’ve seen you can’t take a campaign from Europe straight into Africa and expect it to work; similarly, there are differences between South Africa and Malawi, for example. You really can’t lump together ‘upper’ or ‘lower’ income groups either.”

Rules of thumb

Shirley Harding, head of market research with Standard Bank, says the differences between markets are significant. “One of the biggest mistakes is treating Africa as one. It’s a lot like Europe, when you see that the Greeks are not at all like the Germans;

it’s that type of nuance. It’s not like there’s a strict rule of thumb – like you don’t mix males and females in a group – that applies across all countries in the same way.”

Clusters of countries are often created for cross-border projects, but in the South, for instance, South Africa, Zambia and Zimbabwe are quite different, as are those markets classed as ‘East Africa.’ “Languages play a critical role, and the rate of development, the sophistication of consumers and the disparity between the haves and the have-nots mean huge differences,” says Nkgadima. South Africa alone has 11 official languages, while in Kenya, research would predominantly be in Swahili or English. In areas with high levels of unemployment, it’s easy to catch interviewees at home during the day. In cities, researchers are dealing with individuals, while in rural areas, it’s about talking to a community. “When it comes to the analysis, with some clients you can say, ‘This is

‘As you go up the socio-economic ladder, people tend to lose that humanity and become more isolated from the community’

what we found,’ but there’s a need to understand the local context. I can’t sit here in South Africa and give you a deep dive into Uganda. We need to work with local partners to make research locally relevant.”

What is fairly consistent across markets, however, is a public willingness to participate in research and a desire to please. Some respondents will even try to give the interviewers a gift, rather than the other way around. “[The region is] still under-researched, and people love having their opinion asked,” says Harding. “We’ve done interviews with small businesses that would take an hour of doing it solidly, but they take three hours because the interviewee goes off to serve a customer or take a phone call, and neither the interviewer nor the business person will find it strange.”

Falala says the concept of ‘ubuntu,’ or human kindness, that’s prevalent across much of Africa makes people open to

the idea of helping. “Traditionally, there’s always been a communal approach. What happens is, as you go up the socio-economic ladder, people tend to lose that humanity and become more isolated from the community.” While an interviewer could expect to complete ten interviews per day among the lowest socio-economic groups, that drops to eight per day among those whose incomes range from the 20th to 40th percentiles. Among the top 5 per cent of people, only two or three interviews can be done per day. (Many would-be respondents are not only busy but deterred, because they expect the interviewer to try to sell them something in the end.) In a market like South Africa, researchers have the further challenge of reaching people who live within walled residential compounds, making face-to-face interviews difficult to arrange.

No news isn’t always good news

The prevailing willingness to please applies to staff as well as consumers,



Joy Uyanwune

Harding says. “We’ll often not be told bad news,” she says. “A crocodile might have eaten all the interviews, but you won’t be told about it. It can be quite frustrating. You might go in with a questionnaire that doesn’t make sense, but it might be that people aren’t willing to tell you your question is silly. Ask, ‘Could you think of something that could possibly go wrong?’ rather than just saying, ‘Do you understand?’ Be prepared to hear something quite surprising.”

Researchers in the region report strong demand for product testing on food and drink, vehicles and, perhaps as a result of increasing democratisation, public-sector research. For businesses new to the region, it’s more about understanding the size of the market and what it would take to succeed, so there’s a need to know about market dynamics, consumer segmentation, local preferences, the value chain and distribution.

Technology is transforming the way that research is conducted on the continent. Falala says the phenomenon of emerging markets leapfrogging developed nations’ use of technology is in evidence. “It used to be that a household having a land line was a sign of upward social mobility, and people would even boast about it. The mobile phone revolution has done away with all that – it’s changed the way we communicate.” Poor roads and vast distances between cities used to mean that when someone moved away, it was difficult to keep in touch. Now, Africans are rediscovering old friends with Facebook and making payments with mobiles via M-Pesa. Mobile airtime is sold by street vendors. “The way we live will never be the same again, because Africans are obsessed with their mobile phones,” Falala says. “A lot of people sleep with them under their pillow.”

This passion is leveraged at Plus 94, where 90 per cent of the work they do is via mobile, with airtime and

data bundles used as incentives for consumers to participate in research; focus groups can be conducted via WhatsApp. In South Africa, new rules on charges for customers dialling people on competing networks are driving costs down and making usage more affordable and more responsive to researchers’ approaches. Shirley Harding says that about 80 per cent of Ipsos’ work in Africa is done using mobile. “The dichotomy there is

for permission before you do any interviews.”

Identity crisis

Joy Uyanwune is CEO of Decision Support Consulting and is ESOMAR country representative for Nigeria, where mobile is pervasive, but a sizeable amount of research is still done with pen and paper. “Mobile penetration is 78 per cent, if not more, and access to the internet is also high, so you would imagine we really would be doing a lot more online, but there are limitations.” More than 90 per cent of mobile phones are topped up on a pay-as-you-go basis, rather than through contracts, making it difficult for researchers to be sure about the identity of the people who are using them. Online and mobile panels are slowly being developed. “I think we’ll get more into online next year. We feel like this is the beginning of online research, so we think it’s better that we begin with knowing who people really are.”

‘We feel like this is the beginning of online research’

that you see places with very little infrastructure oxcarts and mud roads and shanties, but you can do extremely sophisticated research techniques,” she says. “You can do tablet-based surveys by picking up a 3G connection under a tree, but then in remote areas, you might have to ask the local chief

‘Everyone wants everything within five minutes’

Such is the sudden enthusiasm for understanding African consumers that clients sometimes want to combine a range of projects, using the same respondents for concept testing, ad recall, image and reputation surveys, and usage research – to the detriment of the overall result. “We find clients say, ‘While you’re at it, find out what the optimum price level is, and while you’re at it, can you find out if they recall my ad campaign?’ You end up with 101 questions, and it’s harder to get completion,” says Falala. As well as

running the risk of participants losing interest in a long survey, completion rates are affected by mobile phone batteries that run out before the end of the interview. “There’s a huge appetite for people to invest in Africa, and

everyone wants everything within five minutes, so they roll up ten surveys into one.”

View from the ground

Another challenge is the fact that national statistics can be unreliable, affecting the quality of work that can be done. If census data is patchy, then researchers can’t be sure what populations are being weighted up to. Representative samples are also affected by sporadic security concerns in particular areas. (Nigeria’s Borno state, for example, is considered unsafe for conducting fieldwork, yet there are cultural mores there that need to be represented if a survey is to be illustrative of the nation.)

Despite these problems, however, there’s confidence. Uyanwune says that the challenges – even the biggest ones – can be overcome. In addition, the view from the ground is somewhat different than that from outside. “When you’re in it, you don’t see things the same way as the media portrays. It’s bad, but it’s not

‘There’s stable, and there’s stable ... Africa has an unsteady heartbeat’

usually that bad. It’s obvious if you do the calculations the opportunity is very high.”

Progress is patchy, Harding concedes, but the big picture is positive, and there is huge excitement about the African growth story, especially as laws change and regulatory frameworks evolve to create a more stable business environment. “There’s stable, and there’s stable,” she says. “Two years ago, you wouldn’t have contemplated being in South Sudan, but now, it’s gone from absolutely nothing to the fastest growth market. You have to be willing to take the good with the bad, take the learnings as they come and go into it understanding that things will be different.”

Falala says: “Africa is happening, but the problem is it has an unsteady heartbeat, due to the fact that it’s recovering from a long-term illness. But once it recovers, it will represent a massive opportunity for many businesses.” ■

3.3

BACKING A NEW GENERATION OF WINNERS

The rise and rise again of Latin America

Sarah Bounphrey and Guillermo Oliveto

More than a billion people focused their attention on Brazil this summer as the FIFA World Cup played out, and, in many ways, events on and off the pitch illustrated much of what the broader region now represents in terms of its status as a market: excitement, hope and drive.

Yet the economic growth of Latin America has, like World Cup football itself, been a game of two halves. On the one hand, the number of millionaires in Mexico and Brazil is growing by between 7 and 9 per cent per year (according to WealthInsight). On the other hand, while the overall rate of poverty is declining, it's still the case that more than 100 million people in the region live on less than US\$ 4 a day.

Sarah Bounphrey, head of strategic, economic and consumer insight at Euromonitor, says the region's increasing economic stability, young population and proximity to the US – especially as the world's largest economy pulls out of recession – are its big attractions

to marketers. Lucrative middle-class consumers, flexing their growing spending power, are their primary target, although those people who (for now) remain at the so-called bottom of the income pyramid also have their allure and offer long-term promise.

“There are more than 87 million middle-class homes with household incomes between US\$ 10,000 and US\$ 45,000 – 60 per cent of which are in Brazil and Mexico,” Bounphrey says. “Engaging with these consumers early on can produce long-term benefits. These consumers, once won, can be transferred up the value chain from the initial low-priced purchases to high-margin products and services.”

Pyramid selling

“Middle class consumers are interested in convenience,” Bounphrey notes, “and are increasingly willing and able to pay for it – good customer service, a wide product range of high-quality goods with a nod to design will have broad appeal.”

The middle classes and their preferences are as varied as the landscape of Latin America. While middle-class households across markets often prioritise education and health, the level of their investment is not consistent from country to country. Bounphrey says they budget, on average, 10.1 per cent of their income for health goods and medical services in Argentina, but in Mexico the proportion is 3.1 per cent.

The bottom of the market is winning increasing attention in the region from marketers developing special package sizes and varieties that suit smaller budgets. Euromonitor data shows that, among the 171 million households in Latin America last year, 36.4 million had an annual disposable income of less than US\$ 5,000, and 64.1 million had less than US\$ 10,000. Individually, their spending power is low, but their numbers are vast. The lowest-earning 10 per cent of households in 13 Latin American countries last year had a combined spending power of US\$ 77 billion.

Guillermo Oliveto, a veteran of international research who now runs his own consultancy, W, in Argentina, says China and India have helped fuel development and, crucially, stability in Latin America through their growing demand for raw materials. Still, the region's newly affluent consumers are little understood by big business, he observes, and this blind spot is behind the rising demand for research.

“This is not the Latin America it used to be; it's a new Latin America,” he says. “Our opportunity as an industry is to be closer to the clients, helping them understand the huge changes we're seeing – how have desires, spending patterns and habits changed.”

The volume of change that's taking place was in evidence in Brazil ahead of the World Cup. Polls showed that the majority of people were unhappy about the event being held there and what they saw as a misdirection of public investment. “When society goes up, their



Karina Besprovan

‘People are going to tell you what they really think’

brands and products – as well as those from elsewhere in the region – replacing what used to be a clamour for all things from the West. “We don’t want to be all the same,” says Oliveto. “We want to be all at the same table, but exchanging things with the others, not just receiving what they have to give.”

desires change,” he says. Yet all emerging markets are not equal. When India’s Tata launched its affordable cars in the region, they quickly realised they had to add comfort and styling or risk being rejected as a “poor people’s car,” Oliveto recounts. As consumer confidence has grown, there’s also been a change in people’s self-esteem and their national pride. “Being from Latin America is now something to be proud of,” according to Oliveto. This manifests itself in demand for local

Straight talking

Karina Besprovan, regional director of Omnicom Media Group Chile, says multinationals have for years focused on the region’s three big markets – Brazil, Mexico and Argentina – but are now also looking at other fast-growing markets such as Peru and Colombia. They’re discovering the diversity that exists both within markets and between them. “The Pacific countries were not the focus of research interest in past years,” she says. “You’re not going to find a lot of Peruvian or Venezuelan or Ecuadorian people who’ve been asked their opinions before, so their feedback is of great value.”

Besprovan says there’s a public willingness to be frank with researchers and little sugar-coating of responses to give answers that please. “They don’t want to please anybody!” she says. “People are, generally speaking, going to tell you what they really think, and when it comes to salaries and other information people regard as confidential, if they’re not going to talk, they’ll just say, ‘I prefer not to

‘The way that they interact and consume is absolutely different. They have their own rhythm’

talk about that.’ But it’s curious, because sometimes people want you to know that they got a very good bargain, they got a good price for something, and of course there’s a lot of variation.

“People in main cities are more similar to each other, and they’re very different to people who live in other areas. For example, when you visit Santiago, it looks very similar to Chicago – you’d be surprised. But if you travel 200 or 300km from Santiago, you’ll find cities like they were in the 19th century – not very developed, no big supermarkets ... You’ll find televisions everywhere, and everyone has a mobile phone, but the way that they live and the way that they interact and consume is absolutely different. They have their own rhythm.”

Yet Boumphrey notes that, while financial inequality within markets has a significant impact on behaviour and spending preferences, it is still the case that a middle-class Brazilian has more in common with a lower-income Brazilian

than with a middle-class counterpart in another market. Brazilians in general tend to be more urban, have smaller households, have a higher proportion of women in employment and espouse similar motivations and desires. In Mexico, meanwhile, the middle classes tend to spend a larger proportion of their incomes on food and non-alcoholic drinks than do Brazilians and Chileans.

This diversity across the region means approaches to research need to be adapted. While it’s still the case in some markets that, when researching consumers in the most remote areas, researchers need to pack not just a pad and pen but also a dose of anti-venom in case of a snake bite, there’s growing use of new technologies such as eye tracking, facial coding, video surveys and online communities. Yet online research only accounts for between 2 and 3 per cent of all research in Brazil and Mexico – far lower than in the US, Western Europe and Japan – not just because the lower social classes have little internet access (making



Constanza Cilley and Sydney Clark

it difficult to obtain representative samples) but also because low labour prices mean there is not as great a cost saving to be had in shifting from in-person or phone-based studies to online.

Mobile, however, is starting to democratise access to the internet: Netquest says that, while 91 per cent of Americans have a mobile phone, in Colombia the figure is almost 98 per cent, and it's only a shade off 100 per cent in Argentina.

Complicated route to success

Constanza Cilley, executive director of VOICES! Research and Consultancy, has a wealth of research experience across the region. She says harnessing technology and understanding how it is used by consumers is essential for the success of market research. "New technologies mean a lot of opportunities, but, although they have reached significant proportions of societies, there is still a considerable digital gap." Lower-income web users are more likely to be accessing the internet via

mobile than from a home computer, for instance.

"Social media has facilitated many processes, and this implies changes in the market and in preferences. One of the main challenges is new technology and being able to adapt methodologies to these new developments. There is a mix in what clients request that goes from traditional research to more cutting-edge techniques such as neuroscience. One of the trends that we see is the increase in qual work, which might be related to deep changes in society which need to be addressed in a more open manner."

Besprovan adds there are further challenges, not least for those used to working in the US and other regions. "Multinationals are not always offering the same services in Latin America as they do in other markets," she says. "If you're like me, and you travel from place to place, then you know what is possible and available, but when you try to apply it to Latin America, they say the market's not

'Local companies are doing better because their focus is in Latin America'

ready ... but it's also the case that those suppliers don't want to invest in those technologies in Latin America."

Staffing can also be a struggle. Besprovan says university graduates rarely leave their studies with all the skills they need to be work-ready – a particular problem in media, where everything changes fast and people need to arrange their own learning if they're to keep their knowledge up to date. They also tend to lack the professionalism required and the willingness to work across international boundaries.

And while multinational research houses may be managing Latin America among a portfolio of emerging markets, those agencies that are home grown have an opportunity to develop in ways that are a perfect fit for their home countries. "Mexican and Brazilian companies can move faster, because they're not watching Asia Pacific and other markets," Besprovan says. "This year at ESOMAR's Latin American event in Argentina, there were a lot of

local companies, and you could see that they're doing well – doing better because their focus is on Latin America."

Another significant challenge to working in the region is the prevalence of red tape, an encumbrance that is slowly being shed as economies mature and governments look to streamline the process of doing business and create the right conditions for innovation and development. Sydney Clark is vice president at IMS Health in São Paulo, where pharma clients are starting to move away from a focus on generic drugs to conducting research into new products and advances in areas such as vaccines. "Research is very low in a country like Brazil, not just in pharma but overall ... but the general trend is upwards," he says. "I think Brazil is among the top-seven countries in pharma, but not in the top ten in clinical trials." It takes too long, Clark says, to get approval for a clinical trial in Brazil (important, because it represents 40 per cent of the market in the region) and few other markets



make the task much easier. In addition, academia tends not to work with the corporate world.

‘Less consumption does not mean less market research’

Links are now being forged, driving research, development and new patents, and both public and private investment is on the up. “There are more funds available,” Clark says. “Governments are investing in a similar way to what South Korea has done, with low-interest loans so companies can drive innovation.” There’s also potential for researchers to help governments and the private sector better create and use databases to streamline and improve services. Linked-up health records are still in their infancy, for instance, and the data that health insurers collect for fraud detection could also be used to tailor consumer service.

Mexican wave

Much of this hope rests, however, on the expectation that the past decade of growth will continue. Very recent growth in the biggest Latin American markets has been erratic, and, as growth in China slows down, those markets that have thrived primarily due to exports of copper and other raw materials could see their economies tested.

Cilley says the region can ride out the storm; it is well practised. “Growth in our countries ... has always gone up and down,” she says. “We are used to cycles in the economy, and our experience shows that in periods of less growth, many companies and clients are alert and need to study how markets are changing and how they can adapt their products or services. Many times, less consumption does not mean less market research.” ■

3.4

ROADS LESS TRAVELLED

The opportunities for market researchers and their client partners in Africa and Latin America are extensive and hold promise to help make up for slow growth – and even no growth – in more developed markets.

- Poverty rates are declining and in many markets are at historic lows, but the absolute number of people living near the bread-line remains huge. Marketers are discovering that, by understanding both people’s aspirations and their budgeting priorities, they can tap into the bottom of the income pyramid, providing low-cost goods and services and establishing what they hope will be a long and loyal relationship.

‘Technology is making up for poor infrastructure and long distances – but beware its limitations’

- The middle classes are expanding apace and are spending with confidence, with growing pride in themselves and their communities and with the desire to express themselves. As the newly wealthy move further up the income ladder, they can be encouraged to buy premium products from brands they are now building relationships with.
- Developing markets in Africa and Latin America share some of the traits of

other fast-growing markets, but one size does not fit all. Low-cost products developed for consumers in Eastern Europe or Asia, for example, cannot be parachuted in and expected to succeed. Local knowledge of markets within markets – an understanding of the nuanced differences in behaviours and priorities between people in different places, age groups and income brackets – is highly prized.

- ‘Technological revolution’ is not just a buzzword but a real phenomenon in these markets, linking people with each other and with the rest of the world after decades of separation caused by poor infrastructure and long distances. Beware its limitations, though: air-time costs can deter respondents from accepting invitations; high rates of contract-free mobile connections make fake identities a real risk; and although phone penetration rates are often higher than in the developed world, internet access is still not universal. ■

4. BIG OPPORTUNITY...

The next generation of data & people

A select group of key industry figures provide their thoughts on how big data is changing future ways of working. While the next generation of researchers discuss what's compelling about a career in market research.

4.1

LOOKING TO THE FUTURE

The longevity, success and respectability of the market research industry rely on talented, motivated people providing services that clients can't find elsewhere (and providing them in ways that move with the changing demands and possibilities of the business world).

windows on consumers' lives, with only short-term applicability. To provide the now-vital extra layer of analytic value, the industry needs to attract the brightest young people with broad ranges of skills and interests. We talk to some new recruits of market research about their experiences so far, and we ask some seasoned industry veterans about what's lacking in recruitment and retention. ■

'To provide the now-vital extra layer of analytic value, the industry needs to attract the brightest young people'

This chapter looks at the ups and downs of big data – not just a catchy buzzword or industry talking point but quite probably a business game changer. So why do so many people groan at the mere mention of it, while others shake their heads in frustration at the misunderstandings about what big data can do (which have almost inevitably led to disappointment)? We look at the reality of big data – and how that reality differs from the misconceptions that initially sprang up regarding what big data could and would reveal.

The expansion of market research into big data (and other methods of finding and making sense of markets) means clients' expectations of the industry are changing. Where the industry fails to deliver on those expectations, clients are either moving research functions in-house or are turning to non-experts to provide what can often be superficial

4.2

WHY 'BIG DATA' IS NOT A DIRTY TERM



Don Hodson and Alex Johnson

The heady buzz that only a year ago surrounded big data and the extraordinary claims of what businesses could achieve with it brought to mind Arthur C. Clarke's observation that "any sufficiently advanced technology is indistinguishable from magic."

Yet even as the business world continues to grapple with a definition of the term big data, it is falling out of favour in many quarters, dismissed as a vague shorthand for something that has tended to lead to great expectations but also big misunderstandings. There is a growing realisation, however, that behind the hype, there is something truly valuable – not a panacea, but an increasingly important tool – that researchers are only just beginning to understand how to deploy.

"People have started rolling their eyes at the mention of it," says Alex Johnson, head of innovation at Kantar. "It's a terribly difficult thing to define, so I've gone out of my way not to use the

expression. Its existence allows people not to be clear about what they really mean."

Don Hodson, director of market research and analytics at AT&T, pulls fewer punches. "I despise the term big data," he says. "It's arguably overused, highly misunderstood and very ill-defined. I use the term because it's the corporate lingo in current use, but I think it's the wrong name for what it is."

Definitions of big data are plentiful. A year or so ago, there was a movement to call something big data if it ticked all boxes for the "three Vs": variety, velocity and volume. Then another V – veracity – crept into the picture, and the broader discussion started to include any huge body of numbers in the realm of big data (and what counted as big enough depended on whom you asked). Yet much of what was being called new and exciting under its new label was, in fact, nothing new at all, and the methods by which it was analysed had been around for years.

Bursting the bubble

It's now also becoming clear that much of the value ascribed to volume and veracity may have been misplaced. Location data, for instance, is quite crude, notes Alex Johnson. It doesn't usually provide a person's location to within a couple of metres, which is what would really be useful. And even really big samples aren't a proxy for census data. Users of an app may provide masses of data, Johnson says, but if you're interested in how many people in a sample of tens of thousands actually went to a particular web site and then bought something, you are ultimately looking at potentially very small numbers of people.

sense of it all," he says. "The dream of big data was that, in principle, you know everything everyone's doing. You can know the effect of changing one variable. Now we find you don't get everybody, and you don't know what they're doing, because different people have got different parts of the data, and they don't necessarily want you to have it, or it's not ethical to get it or join it together. And then you find that, even when you can get a lot of it, it's bloody hard to make any sense of it."

Johnson says people are sliding down the back of Gartner's 'Hype Cycle' curve, which describes the maturation of attitudes to new technology, "but mainly people who ascribed more magic to it than it deserved in the first place. So it was inevitable, because people started to appreciate what was involved – and the limitations."

"There's been so much written about it, so much hype," says Hodson, who notes that internal clients often have

'The dream of big data was that you could know everything everyone's doing'

"Another myth – the splash of cold water on the face – is when people try to make



Thomas Park, Gawain Morrison and Christian Kugel

unrealistic expectations of what can be done. “Calling it big data just trivialises everything. It gives the impression the analysis has been simplified. I think it has really hurt the industry by making it sound like this is something that anyone with ten fingers and a computer can do. Nothing could be further from the truth.”

Google research manager Thomas Park, based in Germany, says there are some misconceptions around the terminology but that, ultimately, what name is used is unimportant. What matters is the insight that datasets of millions of points can yield – and that is yet to become clear to most businesses. “My view is that, as more people get their hands on big data, they’ll see that, while you can now potentially prove something that you had a hard time doing with traditional market research ... it doesn’t pop out automatically. It’s really, really hard work to make sense of that data,” he says.

Snake oil or solutions?

Some of the excitement – and fear –

around the arrival of big data was fuelled by the emergence of new players in the field. Among them is Sensum, a software company providing tools for market research and data analysis. CEO Gawain Morrison says, “We’re a partner, because we provide a toolkit, a means of providing stuff that people haven’t seen before, but the market research industry has concerns around what we do. Even though we adhere to the same code of practice as anyone else, and we’re signed-up members of the MRS ... nobody likes a disruptor, so we’re seen as a potential threat. They wonder, are we selling snake oil? It’s often: ‘You’re not market researchers, and you’re not doing stuff that we understand, so there be witches.’ But it’s here, and it’s come like a steam train, and that’s what everybody needs to wake up to.”

Where true big data parts company with other large data sets seems to be less about size than about the lack of context. The unstructured nature of big data is what makes it unique, because it comes from sources such as social media, location data

or phone calls to customer hotlines. Christian Kugel, VP consumer analytics and research with AOL, says the movement towards different terminology – ‘data synergy’ has emerged as a potential replacement for big data – stems from a misunderstanding about what big data is, what it can do and what it can’t do. In the case of programmatic advertising, for instance, he says big data has been helping brands optimise their sites for certain types of activity.

brand.com site and don’t follow the path to purchase that these optimisation tools assume they do.

“Let’s not forget what an insight is,” Kugel says. “The definition we use around here is this: an insight is the unexpected revelation of the true nature of something. Big data solutions can be really great at that, as can conventional market research, but when the problem is misaligned with the solution, both fail – even if that failure isn’t obvious to anyone. Too often, the solution leads the problem. ‘What can we measure?’ precedes ‘What should we measure?’ This is the fatal mistake. And the sad reality is that most researchers aren’t good enough at figuring out the answer to the question ‘What should we measure?’ This, I think, is a huge opportunity. If auto brands shouldn’t rely so much on brand.com KPIs, what should they measure instead? This is difficult and likely requires a hybrid solution drawing on the disciplines of big data and conventional research.”

‘Too often, the solution leads the problem. This is a fatal mistake’

But while an automotive brand (for instance) can target advertising to encourage people to find dealers and use finance calculators, these efforts are often wasted, because 40 per cent of people who actually buy cars don’t ever visit a



Marie Wallace and Julian Prynn

Joining the dots

Marie Wallace is analytics strategist at IBM and says big data is a hugely beneficial way of analysing what people do – but it's not the end of the process. "Big data really is a synonym for analytics. There's no point having loads and loads of data if you don't do something with it, and that means analyse it," she says.

'Data is incredibly messy; there's no perfect data source'

The interplay between big data and small data is interesting to researchers. There are benefits to looking at groups and demographics, but every individual is different, although part of various larger networks that all need to be understood if that individual is to be properly understood. At IBM, Wallace uses big data to select people who might make a suitable targeted sample for more traditional research, such as interviews.

"At the end of the day, you don't action demographics; you action individuals ... I do think big data as a concept is going to be massively relevant moving forward."

Don Hodson is similarly positive about what can be achieved when big data and other research are combined. "Data is incredibly messy; there's no perfect data source. On the flip side of that, if management is sufficiently pragmatic and can wait for a week or so ... there's enormous value in these data and incredible insights to be had. It's just a matter of managing expectations of what's realistic," he says.

At AT&T, data has helped the organisation understand the value of talking to customers early in their two-year contract to make sure they're happy with their mobile plan, rather than reaching out only when it is time to renew – and when discontent has had plenty of time to fester. But it was only when data was linked with interviews and net promoter scores that it became


clear how people were really feeling. "I have every single chat session and interaction for 18 months," Hodson says. "I could look at that and easily identify which customers are likely to be happy or irate, but different customers have different tolerance levels too."

Kugel, too, says successful deployment of big data means realising its shortcomings. One of the dangers in over-reliance on it, he says, is observing behaviour and mistakenly ascribing meaning to it. People using a shopping app but not buying, for instance, are not necessarily deterred from making a purchase by something that needs to be fixed. They may only ever have wanted to browse for relaxation and may have, in fact, been very happy with the experience. "Big data alone will never reveal that motivation. It will just show that people are not buying or that they are abandoning their cart, which inevitably leads to the conclusion that the app isn't doing what it needs to do. In reality, it might be perfectly solving

a consumer need, which is great for the brand long term, but it tends to be blind to what lies behind the behaviour.

Julian Prynn is global head of marketing strategy planning & insights at British American Tobacco (BAT). He agrees that the term 'big data' has become next-to-meaningless because there's no common understanding of what it is. Yet the data does have value. "It is undeniable that most businesses need to get better at integrating and utilising the ever-increasing range of data available, and to exploit the latest technologies and analytical techniques to derive more actionable insights and value from all this," he says. BAT is renewing its IT and modernising its research so it can better exploit data from multiple sources and markets, and look back in time, using in-house and external analysis techniques.

"While we do have programmes in place to use data and insights from e-commerce and from social media, the principle focus thus far has been a step-



‘We haven’t seen the full power of what you can do with big data yet’

forward in our ability to make use of the large amount of data that we, like most companies, already have now, in much more powerful ways than we were able to in the past,” Prynn says. “The ‘big’ we are targeting is more in terms of impact than complexity, and so far we’re seeing positive results.”

Smart deployment of big data is starting to show itself

Domino effect

Wisdom, it seems, is as important as knowledge, and big data alone is unable to deliver that.

“Big data is core to what we do,” Kugel says. “The company wouldn’t function without it. All of our content analytics, programmatic solutions – everything really – relies on operationalised big data. However, as recently as last week, our CEO, Tim Armstrong, during a

company all-hands meeting, spent about five minutes telling the entire company how important it was that we actually engage with and listen to our users and make it human. No one should rely just on dashboard and fancy analytics. There is simply no substitute for a dialogue with people using our brands. [It’s] an absolute endorsement of the need for both big data and conventional consumer insight initiatives.”

Morrison at Sensum says it’s only now that smart deployment of big data is starting to show itself. “There’ll be a tipping point where enough of the major, tier-one brands have done it that the domino effect will filter through, particularly as more technology and more platforms come onto the market.”

Thomas Park says that, while big data puts quantitative research in the spotlight, at the same time it highlights the need for the one key thing that big data lacks – context – and that comes from qualitative research.

“We haven’t seen the full power of what you can do with big data yet,” he claims. “The point where it becomes interesting is when market research takes these kinds of methodologies and then puts them into a story, into conclusions for the advertiser. In my opinion, that’s something the industry is only about to discover.” ■

4.3

SHOUTING FROM THE ROOFTOPS

Young professionals on a mission to raise the profile of research



Tanmay Dhall, Sarah Cunliffe and Katie Aylward

The gulf between what market research actually is and what most people imagine it to be is starting to narrow, a movement spearheaded by smart young graduates who, often to their surprise, have discovered themselves part of a thriving and diverse industry.

Having themselves stumbled into the sector by accident in many cases, relative newcomers to research are determined to raise the profile of their chosen path and plant the seeds of interest in the current crop of students by explaining that research isn't necessarily what they've been hearing about in lectures.

"There's a huge gap between the market research of today and what's being taught in colleges," says Tanmay Dhall, a qual research consultant with TNS in Dubai and board member of Fringe Factory, the group set up in 2011 by young researchers to get more graduates to consider working in the industry. "The main gap here is the lack of interaction between the industry and academics," he

says. "Today's books and courses don't even talk about online research or qual, so the perception that's perpetuated is one that's far from reality – the paper-and-pen research and calling people up and doing surveys."

Dhall began his own career in research when he took a part-time student job conducting research interviews. This led to a journey of discovery about what else research could offer. (At the time, he was studying economics and sociology; he later went on to earn an MBA.)

Cloak of invisibility

In addition to getting mixed messages in their courses about research, students' lack of awareness is exacerbated by the very fact that such a broad range of skills are applicable to it, and public perceptions of an often invisible part of the broader sector of marketing and business analysis are often outdated.

"In research, there are people from engineers to social media maniacs to

economists and sociologists – we've got everyone – so there's no real single skill being demanded by market research as an industry, and that contributes and has an effect on courses not being up to date," Dhall says. "There's very limited public insight into what the role of market research in marketing is. If you look at industries like advertising, the results are very tangible – we can see advertising and promotions – but research doesn't have that visibility."

'I get the clip-board misconception a lot'

Sarah Cunliffe is now senior research analyst at SKIM in London, a role she has had to explain to most people she knows. "Their experience is based on meeting people who say 'have you got five minutes to answer a few questions?' It's probably a failure of the industry to get out there and explain what the industry's about. And I think back to careers fairs, it was

very much the accountancy houses, the financial and consultancy groups, that were very active, sponsoring events. Even the army was there ... but I didn't know about this."

A year into her research career, Katie Aylward also finds herself explaining a profession that she had never considered before a recruitment consultant suggested it would be a good match for her psychology studies. She is now a junior research executive with Northstar Research Partners. "I get the clip-board misconception a lot," she says. "I always have to say what it is that I actually do. The only people who have a kind of idea are friends who work in marketing, but most of them still don't really know, which I find surprising – but I guess a year ago I didn't know either. We are like consultants, at the end of the day, and it does surprise me that it's not a bigger thing."

"If you could get both, there would be better uptake of graduates and people



Amaury de Condé

‘There’s so much room for personal development and career development’

Stepping stone

Cunliffe’s start in research came about after studying global health public policy and economics. She found few job options

coming into the industry rather than falling into it. A good place to start would be higher education, because when I was at uni, the careers department was good on marketing, finance, business. It was very business and economics driven, and you didn’t hear much else, really. There’s great potential for recruiters and representatives from the industry to come in and say, ‘This is what’s out there.’ It applies to loads of different courses, but even if it just started with the psychology-related courses and with business courses, that would be a great place to start.”

in the health sector because of a lack of work experience. A recruiter accidentally sent her a job spec with a market research company. “I’d never heard of it as a career ... I didn’t know it was anything more than just cold-calling, yet somehow this company seemed to exist and work with companies I found really interesting and diverse. It was international, and there were opportunities for travel.” She approached the company for an internship and was given a paid position.

“In the beginning, it sounded like an interesting company. I thought of it as more of a stepping stone than a career path, but I ended up thinking, ‘Wow, there’s so much room for personal development and career development within this industry,’” she says. “You’re still commissioning people doing surveys, but I didn’t realise there was a layer in between where you get to think alongside international businesses and really get into the ‘why’ – not just asking people, ‘What do you think?’”

‘Many of the hot topics in the research business now are highly relevant to a generation of graduates who are digital natives’

She and Dhall are part of a group of research ambassadors who reach out to universities on behalf of their own companies – and the broader industry – through Fringe Factory. They often find they are alone. “It’s not like any other market researchers are trying to be in that space,” Cunliffe says. “If we didn’t go, I don’t think anyone would.” Fringe Factory is convinced that it’s the lack of awareness, not the job itself, that’s keeping smart young people from seeking out a research career. Its own research of 1,800 graduates in markets as varied as Brazil, the US, Europe, India and China has found that even the industry’s generally somewhat underwhelming pay isn’t a real obstacle. About 80 per cent of people said their primary focus was finding a job they loved and were passionate about, and 73 per cent put a focus on life-long learning as a high priority.

Add to basket – diversity, technology and travel

Having a good work/life balance and a

rewarding career path both ranked as more important than salary. With low visibility, though, research was often trumped by career opportunities in travel, entertainment and media by those wanting to combine work with their outside interests. For those seeking security, government jobs held stronger appeal. Yet, Fringe Factory notes, many of the hot topics in the research business now – social media, the internet of things and big data – are highly relevant to a generation of graduates who are digital natives.

Amaury de Condé, director of human resources at Ipsos France, has a different perspective on recruitment. He says a great many graduates do seek out – rather than fall into – a research career, having been exposed to market research as part of marketing, economics or political science degrees. The increasing diversity of the industry, however, means it should be casting its net wider than the usual profile of graduates.



Jeremy Pace

“We need people who are able to synthesise information from a range of sources and tell a good story, not just a story based on the answers to a questionnaire,” he says. “They need to be able to look at web data, neuroscience, all of that, and analyse it. It’s about the synthesis. Of course, there will be some of these people among those that had the old profiles we were looking for, and many will be able to move forward and evolve the way the industry needs to evolve. We need to open up the type of new graduates that we would look at and should consider journalists, maybe, or graduates who’ve studied history and people with many different profiles that could add to the storytelling capabilities that we need.”

Jeremy Pace works in the sensory and consumer preference network at Nestlé, and while his current role doesn’t involve recruitment, he has been involved in hiring throughout his 35 years in the field. He himself sought out a research career after having discovered the industry while in business college.

“I’ve come across a lot of method-centric people – people who basically knew a tool and want to answer every question with that tool,” he says. “That’s probably understandable because they’re young, but they need to realise the limitations of what they’re doing. People need to understand that we start with the question and then look at all the available tools until we reach the one or the few that will get you the critical information. Then you start filling in the pieces of the puzzle. It’s an incredibly eclectic field, and different people have different strengths in terms of the tools they know. Very few know or use all the tools very well, but to be even reasonably rounded, you have to know that you don’t know all the tools and know who you can rely on to fill your voids. You’re looking for people who are curious and analytical.”

Moving beyond the monotonous

One of the challenges the industry faces is keeping the bright people it does attract, Pace says. “Particularly on the vendor side, new recruits tend to do mindless,

mind-numbing work in terms of the necessary tabulation and stuff like that. And I don’t blame the agencies for feeling they need to fill the seats and have people doing these tasks ... but they should be looking for people who can mature and do something more and from day one should see how their role fits in. It’s not that there isn’t a role for fairly repetitive tasks, but it’s important that people have the opportunity to understand why they’re doing what they were doing and be motivated to do it better.”

‘We’re encouraged to put our ideas forward, because we’re a fresh pair of eyes’

And if individuals do want to move on, they leave research with a collection of sought-after skills. “I’ve been surprised by the whole range of opportunities I’ve been given,” Katie Aylward says. “We get the opportunity to go out and

write about what we’re doing and have the opportunity to be published in big research publications, and my colleague and I are speaking at the ESOMAR Congress. What surprises me is there’s a hierarchy, but it’s not very rigid. Progress by juniors is encouraged; we’re encouraged to speak out and put our ideas forward, because we’re considered to be a fresh pair of eyes.”

Moreover, she observes, “you have insight into brand strategy, advertising and even finance-related things like budgeting, costings of projects, and also PR. It’s completely transferable into loads of other sectors.”

The role of individual companies in bringing fresh faces into the business is not to be understated, says Tanmay Dhall. “The industry’s up for it,” he notes, pointing to the Coca-Cola Center for marketing studies and the Nielsen Northpoint programme as exemplars in this area. “We need a lot more of these. You need to realise the fundamental



presence and identity of market research as an industry is being challenged with the advent of Google Analytics, big data, Facebook research, online; there's a huge rise of more advanced, aggressive boutique agencies challenging the status quo, and the dominance of the big research agencies is under threat. So there's a strong move among the market

'There's young blood which wants change'

research fraternity to kind of rediscover themselves – attract better, sharper and more innovative talent.”

Having been in market research for three years, Sarah Cunliffe says it's inspiring to see colleagues move up and on. (One recently joined the Bill and Melinda Gates Foundation.) “It's cool to see that the skills you learn in this industry, you can take out. A lot of the project management and liaising

with different contractors, that's all applicable to quite a lot of industries.”

Dhall says young people's perceptions of research are slowly changing. “I'm hopeful, but hope is never a strategy. There's young blood in the industry which wants change and is working for it. You see a lot of people now out there talking about what they do. If we can communicate the variety of career opportunities available, it will help us take a real step forward.” ■

4.4

MINDING GAPS, ADDING VALUE

The rise in prominence of data-driven insight in business strategy has shone a light on what great data can achieve but has also exposed gaps in its usefulness. Call it 'big data,' 'data synergy' or something else entirely, and you're still likely to fail to describe a business phenomenon either precisely or in its entirety. But a phenomenon it is all the same, and while very few businesses are actually 'doing' big data or getting great results from it yet, it's widely seen as holding real promise for helping deliver solutions to complex client problems.

'The industry has much to offer bright young people seeking out satisfying, interesting work'

• Answers rarely, however, emerge fully formed from even the largest and best-connected data sets. Analysis is what gives big data its true value, and this is where researchers – who have for some time been seeking to add value to their services beyond data collection – can shine. No longer is there a discussion about whether big data will render researchers obsolete: the industry is well placed to position the successful deployment of data-driven business strategies as being inexorably tied to professional analysis.

• What the growing prevalence of data underlines is the need for new ways of drawing useful insights from ever

greater and more varied sources of information. In many ways, making prescient connections and drawing useful conclusions has always been the role of market researchers. Yet this new era of research does require new techniques and new ways of approaching problems. In turn, this requires the industry to attract a broader range of talented people.

• Market research has never been a high-profile career choice, and some recent graduates have described it as being nearly invisible on campus (with what little exposure they have had to research being a poor representation of the opportunities they now know the industry presents). As the industry expands, however, it has much to offer the brightest young people, who are increasingly seeking out satisfying, interesting work – rather than that which attracts the highest salaries. While several large research houses – and a few client-side multinationals – are reaching out to students and exciting them about a research career, these efforts need to be more widespread if they are to have anything approaching the effectiveness of recruitment displayed by accounting and consultancy firms. ■



5. TOP 25 COMPANIES

Laurence N. Gold examines the performance of the Top 25 market research companies, highlighting winners and losers in the current economic climate, and reviewing merger and acquisition activity, profitability, and expectations for the future.

MODEST GROWTH FOR WORLD'S LARGEST RESEARCH FIRMS

By Laurence N. Gold

The world's largest 25 marketing research firms experienced modest revenue growth in 2013, driven by syndicated services firms and held in check by changing currency exchange rates and flat revenue per employee.

Total growth of the Top 25 improved slightly over the prior year, increasing 3.3% in 2013 (vs. 2.6% in 2012), but remained well below the previous two years (at about 6% each, following recovery from the worldwide recession) as shown in Table 1. After adjusting for inflation, growth was reduced to 2.0% and 0.5% for 2013 and 2012 respectively, which together represents about a third of the growth of the prior two years combined.

To understand why this happened, it is necessary to look at the wide swings in currency exchange rates versus the

US Dollar over the last two years. For example, the Japanese Yen jumped nearly 24% and the Brazilian Real increased over 10% compared to the US Dollar in 2013. Conversely, the Euro dropped over 9% and the British Pound declined nearly 2% versus the US Dollar in 2012. These swings, when netted out, served to depress the Top 25 firms' total growth rate over the past two years.

Mergers and acquisitions (M&A's) contributed as well, but much less than in the years 2005-2009, which showed total growth of nearly 10% per year.

Table 1: Year-to-year revenue growth of Top 25

	GENERIC*	CURRENCY EFFECTS/ +M&A'S	= TOTAL	AFTER WW INFLATION
2013	3.4%	-0.1%	3.3%	2.0%
2012	2.6	NC	2.6	0.5
2011	4.1	1.6	5.7	3.0
2010	4.9	1.1	6.0	4.3
2009	-3.1	2.5	-0.6	-2.0
2008	3.9	2.9	6.8	3.5
2007	7.7	1.4	9.1	6.1
2006	5.1	3.5	8.6	6.4
2005	5.4	4.5	9.9	7.4
2004	4.8	1.1	5.9	3.4

*Generic excludes M&A's (acquisitions or divestitures) and currency effects.
Note: Growth rates based on home country currencies.

At the same time, currency fluctuations during those earlier years had much less effect than in the past two years. Still, M&A's' contribution to total growth was cancelled out by the negative effect of currency exchange rate changes.

Generic growth, which strips away the effects of both currency fluctuations and M&A's, reveals the underlying basic business direction of the Top 25. Its growth for the last two years mirrors total growth, but is less than years prior to 2012 when, with some exceptions, generic growth averaged 4% to over 5%.

This current weakness reflects continued conservative research spending by corporate buyers caused by worldwide economic conditions: the slow recovery of the US economy, a European economy mired in recession with continuing debt and banking problems, and slowing economies in Asia Pacific markets.

term contracts. However, the differences are quite modest.

Not all Top 25 firms shared in the overall gain: 14 firms on this year's list grew faster than inflation, the same number as last year, including just three that grew by double digits. Of the 11 remaining, eight experienced actual revenue declines.

In the past, smaller firms typically grew faster than larger firms, and this is true for 2013 as well. Among the top five research firms, those with revenues over US \$1 billion each, revenues increased 3.0% organically (vs. 2.3% for the same firms last year). The balance of 20 smaller firms grew at 4.9% (compared with 4.3% a year ago).

Top 25 ranking changes

Change within the rankings of the Top 25 firms is constant from year to year, and 2013 is no exception.

Among the 10 firms at the top of the rankings, Nielsen once again kept hold on 1st place – a status unchanged since the list was first compiled – and accounted for 28% of the list's revenues. Kantar, whose revenue increased 1.6%, continues to grapple with economic conditions in both Europe and the US, but nevertheless retained its 2nd place ranking. IMS is now reporting full-firm revenues, as revealed by its new listing on the New York Stock Exchange, and moved to 3rd place. As a result, Ipsos fell to 4th place and GfK to 5th place, each growing by less than 1%.

IRI retained its 6th place ranking, after moving up two places in 2012 with last year's large organic growth. Westat, which

Just three companies grew by double digits

Few firms drive growth

What drove growth this year? Seven fully or mostly syndicated firms – Nielsen (including its acquisition Arbitron), IMS, IRI, NPD, comScore, J.D. Power and Video Research – accounted for 58% of Top 25 revenues and had a combined growth rate of 4.1%. The balance of 18 firms grew by 2.5%, just above the 1.7% inflation rate. Thus, syndicated firms primarily drove growth this year, supported by their long-

experienced a 17% growth rate after being flat last year, moved up to 7th place with a large revenue gain. 'dunnhumby' returned to the list this year with an 8th place ranking, while INTAGE dropped two ranks to 9th due to large Yen-to-Dollar exchange rate changes. NPD held its 10th place ranking.

A 2013 ranking required revenue of US\$ 100 million

Among the remaining 15, three firms moved up at least two ranks. Symphony Health Solutions moved from 19th to 16th place, helped by rapid spending increases in US healthcare. ORC moved from 24th to 22nd with the full integration of its Marketing Research Services acquisition. J.D. Power regained its 12th place ranking by fully recovering from revenue declines two years ago.

Video Research moved down two places due to currency exchange rates, while Lieberman Research fell four places to the bottom of the list due to both a decline in revenues and the fact that a new entrant to the list was ranked above it. Decision Resources Group is the second firm new to the list. Displaced was Nikkei Research, whose revenues fell below the threshold, while Arbitron became part of Nielsen.

More changes this year

Looking deeper into the Top 25 reveals the following not-so-apparent changes have been observed.

- The qualifying threshold is higher. A 2013 ranking required revenue of US\$ 100 million, an increase of nearly US\$ 8 million over last year. For the eight years following 2000, the threshold ranged up and down between US\$ 42 million and US\$ 54 million, but in 2008 it began to rise to its present record high level, which will no doubt continue to rise in the future.
- Merger & Acquisitions (M&A's) declined. The number of M&As made by the Top 25 firms declined in 2013 by 67%, to 21 versus 31 the year before. The big acquisition in 2013 was Nielsen's buying Arbitron, which accounted for about 75% of total Top 25 M&A revenue. The top year for acquisitions was 2008, just before the start of the worldwide recession. Acquisitions were mostly small in 2013, which trend is in keeping with most firms' strategy of "backing and filling" internationally.
- The top five firms (excluding IMS, which did not reveal its acquisitions) made 14 of 21 M&As this year (or two-thirds of the total by count). Kantar led the list with six, followed by GfK with three and Ipsos with two. Nielsen also had two, including the big Arbitron buy.
- Productivity continues to be flat. In 2013, productivity averaged US\$ 176,000 in revenue per full-time employee. Productivity has been relatively flat over the last six years (despite a dip in 2009). More efficient and less costly software, more data collection via the internet and more business-focused management have all played a part.

- Ownership is more concentrated. This is primarily a consequence of amalgamation, the end result of hundreds of acquisitions made over many years in many countries. Eight firms, accounting for most of the Top 25 revenues, are publicly listed companies in the USA, UK, France, Germany and Japan. Four others are wholly owned subsidiaries of larger public or private companies, with the balance privately held by institutional investors, private equity firms or company founders/top executives. Two companies did not provide financial information (which was estimated for this report).

What's next for the top 25

It is safe to assume the Top 25 will continue to grow in the near term, but at a rate one-third to one-half of that prior to the recession, given the persistently unsettled economic conditions that continue to prevail around the world. Still, demand exists for syndicated research firms as corporate buyers seek marketplace understanding.

while the future of ad hoc survey research, subject as it is to the whims of corporate buyers, remains cloudy. Meanwhile, the Top 25 cautiously continue to adopt digital and big data, which could be the driver of market research in the future. Social media research has also been adopted by the Top 25 firms, but how it will impact the future of these businesses remains unclear.

Will M&A activity resume its pre-recession pace? In the past, the Top 25 firms have turned to M&As when they wanted to increase their size. Lately, however, they have concentrated on acquiring small firms to satisfy local requirements. M&A activity will contribute more significantly to growth again when the big firms resume buying each other. ■

The Top 25 cautiously continue to adopt digital and big data

Where this leads the Top 25 in its longer term future is uncertain, given that spending for market research is partially discretionary and subject to continuing economic uncertainty.

Both syndicated and overlapping media research will continue to be in demand,

2013 Top 25 Global research organisations

RANK		ORGANISATION	HEADQUARTERS	PARENT COUNTRY			RESEARCH-ONLY FULL-TIME EMPLOYEES ¹	GLOBAL RESEARCH REVENUES ² (US\$ MILLIONS)	PERCENT CHANGE FROM 2012 ³	Revenues From Outside	
										HOME US\$ IN MILLIONS	COUNTRY %
2013	2012										
1	1	Nielsen Holdings N.V.	New York & Netherlands	USA			36,700	\$6,045.0	4.0%	\$2,850.4	47.2%
-	1	Nielsen Holdings N.V.	New York & Netherlands	USA			35,400	5,569.0	3.9	2,844.2	51.1
-	9	Arbitron Inc.,	Columbia, Va.	USA			1,300	476.0	5.8	6.2	1.3
2	2	Kantar*	London & Fairfield, Conn.	UK			22,800	3,389.2	1.6	2,436.6	71.9
3	5	IMS Health Inc.	Danbury, Conn.	USA			10,000	2,544.0	6.1	1,609.0	63.2
4	3	Ipsos SA	Paris	France			15,536	2,274.2	0.8	2,116.9	93.1
5	4	GfK SE	Nuremberg	Germany			12,940	1,985.2	0.8	1,389.6	70.0
6	6	Information Resources Inc.	Chicago	USA			4,635	845.1	4.1	341.4	40.4
7	8	Westat Inc.	Rockville, Md.	USA			2,044	582.5	17.0	18.8	3.2
8	-	dunnhumby Ltd.	London	UK			715	453.7	8.8	347.0	76.5
9	7	INTAGE Holdings Inc.**	Tokyo	Japan			2,527	435.5	6.5	24.2	5.6
10	10	The NPD Group Inc.	Port Washington, N.Y.	USA			1,282	287.7	5.4	85.4	29.7
11	11	comScore Inc.	Reston, Va.	USA			1,166	286.9	15.7	84.1	29.3
12	15	J.D. Power and Associates*	Westlake Village, Calif.	USA			738	258.3	2.5	85.4	33.1
13	13	IBOPE Group	Sao Paulo	Brazil			3,296	231.1	3.4	51.7	22.4
14	14	ICF International Inc.	Fairfax, Va.	USA			908	225.3	-6.0	53.3	23.7
15	13	Video Research Ltd.**	Tokyo	Japan			414	204.0	-0.3	—	—
16	19	Symphony Health Solutions	Horsham, Penn.	USA			548	198.7	-1.3	2.2	1.1
17	16	Macromill Inc.	Tokyo	Japan			864	184.7	10.6	20.1	10.9
18	17	Maritz Research	Fenton, Mo.	USA			757	177.6	-6.0	38.7	21.8
19	18	Abt SRBI Inc.	Cambridge, Mass.	USA			1,138	172.8	-1.6	17.1	9.9
20	-	Decision Resources Group	Burlington, Mass.	USA			625	150.3	4.2	42.2	28.1
21	20	Harris Interactive Inc.	New York	USA			542	139.7	-0.7	53.6	38.4
22	24	ORC International	Princeton, N.J.	USA			494	122.0	-0.8	40.1	32.9
23	22	Mediametrie	Paris	France			705	106.1	2.0	14.9	14.0
24	25	You Gov Plc.	London	UK			524	101.4	6.0	71.3	70.3
25	21	Lieberman Research Worldwide	Los Angeles	USA			412	100.3	-1.5	32.3	32.2
Total							122,301	\$21,501.3	3.4%	\$11,826.3	55.0%

* Estimated.

** For fiscal year ending March 2014.

¹ Includes some non-research employees² Total revenues that include non-research activities for some companies are significantly higher.³ Rate of growth from year to year has been adjusted so as not to include revenue gains or losses from acquisitions or divestitures. Rate of growth is based on home country currency and excludes currency exchange effects and M&As.



6. KEY FINANCIAL FIGURES

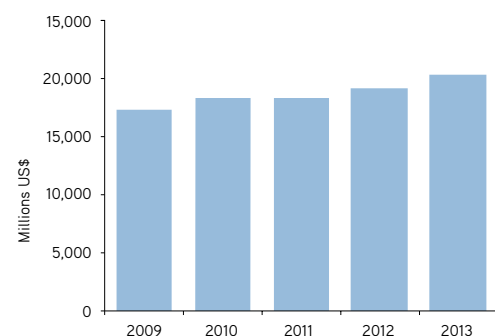
The key financial figures provide profit and loss data and key ratios for the top 10 companies, alongside key information on the companies and their leadership teams.

THE TOP 10 COMPANIES

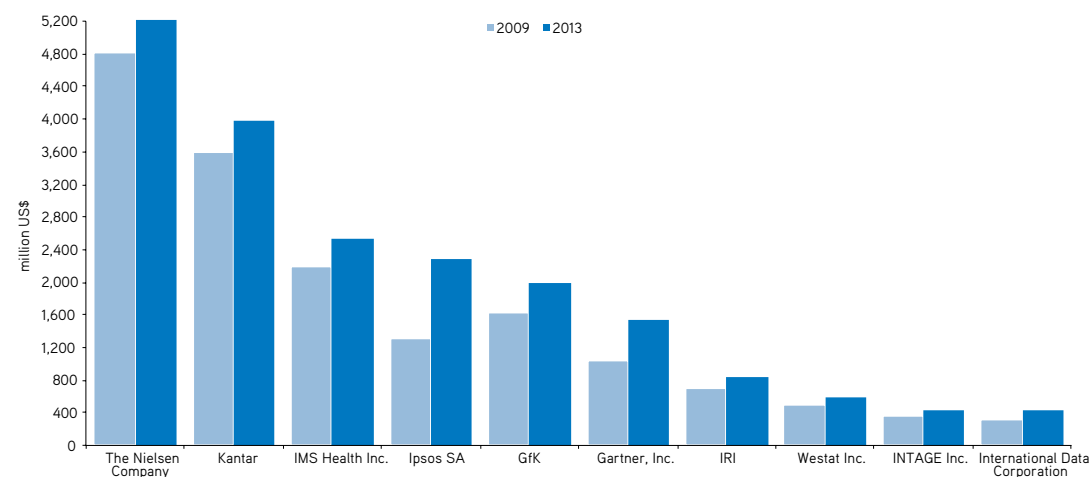
The top 10 companies account for 50% of the global market research turnover. The composition of the 2013 list includes a couple of changes. IMS Health climbed to third place (from no. 6 the previous year) following its recent listing on the New York Stock Exchange. As a result, Ipsos, GfK and Gartner moved down one place, to 4th, 5th and 6th place respectively. INTAGE's turnover increased in local currency

terms, but the company experienced a decline in US Dollar terms, from US\$ 500 million in 2012, to US\$ 436 million in 2013. This is the effect of the weakened Japanese Yen against the US Dollar in 2013. Arbitron, which was ranked 10th last year, has left the Top 10 following Nielsen's acquisition. Subsequently, International Data Corporation now debuts in the Top 10, taking over Arbitron's 2012 position.

Total revenue top 10 companies 2009 to 2013 (US\$M)



Top 10 company revenues 2009 to 2013 (US\$M)



1. THE NIELSEN COMPANY

Company	THE NIELSEN COMPANY
Headquarters	New York (USA)
Website	www.nielsen.com
Listed on	New York Stock Exchange
Leadership team	Mitch Barns, Chief Executive Officer Rick Kash, Vice Chair Jamere Jackson, CFO Brian J. West, CFO

(IN US\$M)	2013	2012	2011	2010	2009
Revenue	5,703	5,590	5,532	5,126	4,808
Other income	—	—	—	—	—
Total income	5,703	5,590	5,532	5,126	4,808
Cost of revenue	-2,398	-2,273	-2,237	-2,129	-2,023
Selling and general administrative	-1,815	-1,758	-1,888	-1,648	-1,523
Other operating expenses	-629	-597	-613	-619	-1,146
Cost and expenses	-4,842	-4,628	-4,738	-4,396	-4,692
Operating Profit	861	962	794	730	116
Non-operating income / expense	-34	-18	3	33	-101
Profit before tax	827	944	797	763	15
Interest income	2	4	15	5	7
Interest expense	-309	-531	-705	-660	-644
Income tax benefit / expense	-89	-144	-22	46	195
Profit / Loss from continuing operations	431	273	85	154	-427
Profit / loss from discontinued operations	305	-1	1	-22	-61
Net Income / loss	736	272	86	132	-488
Current assets / current liabilities	1.39	0.96	1.0	1.0	1.0
equity / liabilities	0.6	0.5	0.5	0.3	0.2
Net income in % of revenue	12.9%	4.9%	1.6%	2.6%	-10.1%
# full time employees at year end	36,700	34,000	35,000	34,000	34,000
Net income / employee	20,054	8,000	2,457	3,882	-14,353

Non-research revenue is included

Note: Re-statement of the 2009-2013 financial results and rounding off the data may result in different outcomes.

Note 2014: In Q1 2014, Nielsen generated revenues of US\$ 1,489 million, an increase of 12.9% compared to Q1 2013.

This includes the acquisitions of Arbitron and Harris Interactive.

2. KANTAR

Company	KANTAR, WPP'S DATA INVESTMENT MANAGEMENT DIVISION
Headquarters	London (UK)
Website	www.kantar.com
Parent company	WPP Plc
Listed on	London Stock Exchange and Nasdaq
Leadership team	Eric Salama, Chairman & CEO, Kantar Group Robert Bowtell, CFO, Kantar Group Bart Michels, CEO, Added Value Travyn Rhall, CEO, Millward Brown Thomas Pulliyel, President, IMRB

(IN GBPM)	2013	2012	2011	2010	2009
Revenue	2,550	2,460	2,458	2,430	2,297
Other income	—	—	—	—	—
Total income	2,550	2,460	2,458	2,430	2,297

Note 2014: in Q1 2014, WPP's data investment management division generated revenues of GBP 566 million, a drop of 3.8% compared to Q1 2013.

3. IMS HEALTH INC.

Company	IMS HEALTH INC.
Headquarters	Danbury (USA)
Website	www.imshealth.com
Listed on	New York Stock Exchange
Leadership team	Ari Bousbib, Chairman & CEO Ronald Bruehlman, Senior VP & CFO

(IN US\$M)	2013	2012	2011	2010	2009
Revenue	2,544	2,443	2,364	1,869	2,190
Other income	—	—	—	—	—
Total income	2,544	2,443	2,364	1,869	2,190

Note: 2009 - 2013 revenues have been re-stated as IMS Health has become public again in April 2013 with a listing on the New York Stock Exchange, reporting full-year revenues.

Note 2014: In Q1 2014, IMS Health generated revenues of US\$ 645 million, an increase of 6.6% compared to Q1 2013.

4. IPSOS

Company	IPSOS SA
Headquarters	Paris (France)
Website	www.ipsos.com
Listed on	Euronext Paris
Leadership team	Didier Truchot, Chairman and CEO Jean-Marc Lech, Vice-Chairman & Deputy CEO Laurence Stoclet, Deputy CEO & CFO

(IN EURM)	2013	2012	2011	2010	2009
Revenue	1,712	1,790	1,363	1,141	944
Other income	1	—	—	—	—
Total income	1,713	1,790	1,363	1,141	944
Cost of revenue	-615	-642	-491	-418	-354
Selling and general administrative	-917	-969	-711	-603	-501
Other Operating Expenses	-23	-42	-29	-3	-2
Cost and expenses	-1,555	-1,653	-1,231	-1,024	-857
Operating Profit	158	137	132	117	87
Non-operating income/ expense	-99	-28	-7	-16	-10
Profit before tax	59	109	125	101	77
Interest income	—	—	—	—	—
Interest expense	—	—	—	—	—
Profit / loss before income tax expense	59	109	125	101	77
Income tax expense	-34	-27	-34	-28	-18
Net Income	25	82	91	73	59
Current assets / current liabilities equity / liabilities	1.8	1.6	1.6	1.6	1.5
equity / liabilities	0.7	0.7	0.7	0.9	0.9
Net income in % of revenue	1.5%	4.6%	6.7%	6.4%	6.3%
# full time employees at year end	15,536	15,927	16,569	9,498	8,761
Net income / employee	1,609	5,148	5,517	7,686	6,734

Note 2011: External revenues (Synovate Ltd and Synovate Inc) for Q4 are included

Note 2014: In Q1 2014, Ipsos generated revenues of EUR 343.3 million, a drop of 4.5% compared Q1 2013.

5. GFK

Company	GfK
Headquarters	Nuremberg (Germany)
Website	www.gfk.com
Listed on	Frankfurt Stock Exchange
Leadership team	Matthias Hartmann, CEO Pamela Knapp, CFO Dr. Gerhard Hausruckinger, COO Debra A. Pruent, COO

(IN EURM)	2013	2012	2011	2010	2009
Revenue	1,495	1,515	1,374	1,294	1,165
Other income	5	11	18	20	24
Total income	1,500	1,526	1,392	1,314	1,189
Cost of revenue	-1,008	-1,030	-924	-872	-813
Selling and general administrative	-328	-323	-288	-268	-250
Other Operating Expenses	-137	-42	-41	-37	-36
Cost and expenses	-1,473	-1,395	-1,253	-1,177	-1,099
Operating Profit	27	131	139	137	89
Non-operating income/ expense	2	-1	4	3	4
Profit before tax	29	130	143	140	93
Interest income	17	24	12	12	6
Interest expense	-42	-45	-29	-28	-23
Profit / loss before income tax expense	4	109	126	124	76
Income tax expense	-46	-44	-37	-41	-15
Net Income	-42	65	89	83	61
Current assets / current liabilities	1.1	0.8	1.0	0.9	0.8
equity / liabilities	0.6	0.7	0.8	0.7	0.6
Net income in % of revenue	-2.8%	4.3%	6.5%	6.4%	5.2%
# full time employees at year end	12,904	12,678	11,457	10,377	10,058
Net income / employee	-3,255	5,088	7,768	7,998	6,065

Note 2014: In Q1 2014, GfK generated revenues of EUR 334.9 million, a drop of 0.7% compared to Q1 2013.

6. GARTNER INC.

Company	GARTNER INC.
Headquarters	Stamford (USA)
Website	www.gartner.com
Listed on	New York Stock Exchange
Leadership team	Eugene A. Hall, CEO Christopher J. Lafond, EVP & CFO

(IN US\$M)	2013	2012	2011	2010	2009
Revenue	1,531	1,442	1,320	1,167	1,039
Other income	—	—	—	—	—
Total income	1,531	1,442	1,320	1,167	1,039

Note: For the full year 2013, Gartner generated total revenues of US \$1,784 million. This is segmented into 3 business segments: Gartner Research, Gartner Consulting and Gartner Events. Gartner Events is being excluded from the table above; these non-research revenues cover the events held by Gartner. Gartner Consulting is aligned to the key initiatives addressed by Gartner Research.

Note 2014: In Q1 2014, Gartner generated revenues of US\$ 447 million, an increase of 10.0% compared to Q1 2013.

7. IRI

Company	IRi (Information Resources Inc.)*
Headquarters	Chicago, Illinois (USA)
Website	www.symphonyiri.com
Listed on	Privately owned
Leadership team	Andrew Appel, President & CEO Mike Duffey, CFO

(IN US\$M)	2013	2012	2011	2010	2009
Revenue	845	764	764	727	706
Other income	—	—	—	—	—
Total income	845	764	764	727	706

*formerly SymphonyIRI Group Inc.

8. WESTSTAT INC.

Company	WESTSTAT INC.
Headquarters	Rockville, Md (USA)
Website	www.westat.com
Listed on	Employee owned
Leadership team	James E. Smith, President & CEO

(IN US\$M)	2013	2012	2011	2010	2009
Revenue	583	496	507	455	502
Other income	—	—	—	—	—
Total income	583	496	507	455	502

9. INTAGE INC.

Company	INTAGE INC.
Headquarters	Tokyo (Japan)
Website	www.intage.co.jp
Listed on	Tokyo Stock Exchange
Leadership team	Kenji Miyakubi, President and Representative Director

(IN YENM)*	2013/2014	2012/2013	2011/2012	2010/11	2009/10
Revenue	42,508	39,930	36,658	36,538	34,526
Other income	—	—	—	—	—
Total income	42,508	39,930	36,658	36,538	34,526
Cost of revenue	-31,107	-29,121	-25,875	-26,022	-24,139
Selling and general administrative	-7,895	-7,500	-7,898	-7,051	-7,131
Other Operating Expenses	0	-121	—	—	—
Cost and expenses	-39,002	-36,742	-33,773	-33,073	-31,270
Operating Profit	3,506	3,188	2,885	3,465	3,256
Non-operating income/ expense	-132	-533	-47	-18	-181
Profit before tax	3,374	2,655	2,838	3,447	3,075
Interest income	6	5	—	—	—
Interest expense	-51	-56	—	—	—
Profit/ loss before income tax expense	3,329	2,604	2,838	3,447	3,075
Income tax expense	-1687	-1,354	-1,514	-1,533	1,389
Net Income	1,642	1,250	1,324	1,914	1,683
Current assets / current liabilities	1.7	2.4	—	—	—
equity / liabilities	1.0	1.1	—	—	—
Net income in % of operating revenue	3.9%	3.1%	3.6%	5.2%	4.9%
# full time employees at year end	2,527	2,465	2,271	1,977	1,966
Net income / employee	649,782	508,316	583,003	968,134	856,053

10. INTERNATIONAL DATA CORPORATION

Company	INTERNATIONAL DATA CORPORATION (IDC)
Headquarters	Framingham (USA)
Website	www.idc.com
Listed on	Privately owned
Leadership team	Patrick J. McGovern, Founder and Chairman Bob Carrigan, CEO

(IN US\$M)	2013	2012	2011	2010	2009
Revenue	421	401	378	345	321
Other income	—	—	—	—	—
Total income	421	401	378	345	321



7. INDUSTRY JOURNAL

A review of mergers and acquisition, key people moves, client wins and other industry news.

2013

KEY

- Other
- New business
- Standards and governments affairs
- Merger / acquisition / alliance
- Appointments / people

02 FEBRUARY

- Nielsen loses Australian radio contract to GfK
- FTC creates guide for mobile app developers in the USA
- African Union releases draft convention on data protection
- ESOMAR and EFAMRO visit key Parliament officials negotiating EU data protection framework
- FTC finalises settlement with web analytics firm Compete
- Leger buys Pharma specialist Researchology
- Vision Critical names Donna de Winter as CFO

03 MARCH

- Facebook secures off-line data to enhance ad offer
- TNS wins Qual Eurobarometer for another four years
- SKIM opens London office
- GMI launches tracking survey checker
- Ipsos opens APAC employee research division
- MEPs issue 3000 amendments to proposed EU data protection framework; ESOMAR and EFAMRO issue 2nd position paper
- TNS appoints Richard Ingleton as new global CEO
- Gayle Fuguitt named ARF president and CEO

04 APRIL

- SymphonyIRI returns to IRI
- Malaysian MR society builds respondent database
- New DIY survey platform ZappiStore launched
- NPD launches distributor-based foodservice tracker
- Heineken builds real-time mobile model to engage consumers
- The Market Research Society Singapore and ESOMAR jointly submit a position paper in response to Singapore's Personal Data Protection Commission's consultation
- ESOMAR release first of the Government Affairs "Matters" video series
- IMS Health buys social media analyst Semantelli
- Vision Critical teams up with Dentsu to offer communities in Japan
- Six new VPs for Dunnhumby USA

05 MAY

- ESOMAR updates the country overview of Unsolicited Contacts for Market Research
- US Federal Trade Commission releases FAQs on COPPA
- Ipsos Mori denies claims of selling personal data from customer of the EE mobile phone network
- TNS buys Chinese auto researcher Sinotrust
- Mobile marketing company Brandtone partners with TNS to access consumers in South Africa, Turkey, Russia and Brazil
- New IBM tools target employee data
- TNS's Judith Passingham to join Ipsos in 2014

- Travyn Rhall takes global CEO role at Millward Brown
- IAG co-founder Alan Gould joins uSamp as CEO

06 JUNE

- US agency Forbes Consulting debuts DIY neuroscience approach
- Ipsos opens SMX Social Media Research Division in the UK, the US, France, Germany and China
- ESOMAR supports OIROM statement on Russian Opinion Polls
- ESOMAR symposium in Boston scopes the future for big data
- ESOMAR launches key requirements for mobile research and commitments to respondents
- ESOMAR and WAPOR release the Making Public Polling Matter in Georgia report, responding to the invitation from The Open Society Think Tank Fund and the Open Society Georgia Foundation
- WPP and Twitter enter global partnership
- dunnhumby buys Standards Analytics

- Former Synovate CEO Robert Philpott to lead direct marketing and targeting giant Harte-Hanks

07 JULY

- BrainJuicer sales up 4% in first half of 2013
- Ipsos sees 4% drop in first half revenues despite second quarter rise
- Gartner reports 12% rise in 2nd quarter revenue for its Research division
- Nielsen revenues up 3% in Q1 of 2013
- Ipsos sues Aegis over Synovate sale

- YouGov launches eGov monitor in United Arab Emirates
- CommScore wins Malaysian web currency task

- IRI acquires FreshLook
- Publicis and Omnicom to merge, pushing WPP in second place
- Kantar buys Bangladesh's Sirius
- [x+1] buys mobile analytics firm WDA

08 AUGUST

- Google fined US\$ 22 million by FTC over Safari cookie drops
- SKIM opens in Brazil and Costa Rica
- ESOMAR issues new briefing note on France's new law affecting research incentives also known as the Loi Bertrand
- ESOMAR guidelines available in Spanish
- MRops buys Radar Global
- Millward Brown buys Brazil's BrandAnalytics
- INTAGE strikes alliance with New Delhi-based R.S. Market Research Solutions
- Dunn and Humby join Starcount

KEY

- Other
- New business
- Standards and governments affairs
- Merger / acquisition / alliance
- Appointments / people

09 SEPTEMBER

- YouGov expands MENA omnibus surveys to India and Pakistan
- The Observer appoints Opinium to run political polls

- ESOMAR issues its legal analysis of upcoming California Assembly Bill AB370 requiring privacy policies to disclose third-party tracking and opt-out options for consumers
- Google and Nurago launch media consumption panel
- ESPN, Arbitron and ComScore chase five-platform measurement
- LBi to be acquired by Publicis Group for US\$ 416 million
- Vision Critical promotes Scott Miller to group chief executive

10 OCTOBER

- Google turns Consumer Survey question limit up from 2 to 10
- SurveyMonkey sues MarketTools for alleged non-payment of invoices
- Kantar Worldpanel and IMRB in expanded consumer panel deal
- ComScore wins AMAA measurement contract
- ESOMAR and WAPOR issue guidance to Georgian pollsters on abiding with the ESOMAR / WAPOR polling guidelines to preserve credibility in upcoming elections
- Civil Liberties Committee of the European Parliament adopts draft EU GDPR placing pressure on the Member States to adopt their drafts
- IBM buys telecoms customer insight firm The Now Factory

- Pricewaterhouse to buy Booz consulting firm
- Nielsen announces successful completion of Arbitron acquisition

11 NOVEMBER

- KPMG opens Big Data Investment Fund
- Vision Critical in Aeroplan Community deal
- AMRB opens office in Saudi Arabia
- PwC buys analytics and UX specialist BGT
- Mitch Barns to become CEO of Nielsen in 2014
- Millward Brown's Fuentes to become LatAm CEO
- Nielsen chief David Calhoun to join private equity group

12 DECEMBER

- SurveyMonkey to open its first UK office
- GfK finalises US\$ 100 million Brazilian TV ratings deal
- South African President Jacob Zuma signs into force South Africa's data protection POPI law, making it amongst the first African countries to adopt comprehensive data protection
- Apple buys social media analyst Topsy for US\$ 200 million
- Bain Capital offers US\$ 501 million to acquire Macromill
- Kantar to acquire media monitoring firm Fisheye
- Industry veteran Jack Honomichl dies at age of 85

2014**01 JANUARY**

- IMS Health files for initial public offering
- BrainJuicer bounces back with 17% growth in 2013
- Egyptian TV stations accuse Ipsos of bias in reporting audience ratings
- GfK to provide Twitter TV insights in Europe
- WPP in global social data deal with DataSift
- ESOMAR issues its legal analysis of the new Draft Protection Act in Poland
- ESOMAR and EFAMRO draft a joint letter addressing Justice and Home Affairs Ministers ahead of the EU member states' negotiations on EU GDFPR
- California Assembly Bill AB370 comes into effect
- YouGov acquires Decision Fuel
- Confrimit acquires text analytics provider Integrasco

02 FEBRUARY

- Kantar Worldpanel expands to Nigeria, Kenya and Ghana
- Nielsen completes US\$ 119 million purchase of Harris Interactive
- Nielsen buys shopper marketing specialist Nexium
- Serge Matta to become comScore CEO
- Salience Insight hires Pat Molloy as consulting CIO

03 MARCH

- Lightspeed GMI adds Facebook data to panelist profiles
- TNS to upgrade TV Measurement in the Baltics
- uSamp founders launch new firm, 'Innovate'
- Communispace launches Healthcare arm
- Toluna opens Korea office
- IBM invests US\$ 100 million in interactive experience labs
- European Parliament adopts its draft of the EU GDPR
- Nielsen announces joint venture with MMRD in Myanmar

04 APRIL

- Ipsos reports 4.5% drop in Q1 revenues
- Nielsen up 4.8% in Q1 2014
- WPP's Q1 data investment revenue down by 3.8%
- GfK Q1 revenues down by 2.7%
- Ipsos signs Realeyes for facial coding and body gesture metrics
- Toluna partners with BrainJuicer for emotional measurement
- ESOMAR and CASRO/GRBN consult on joint guideline on Online Sample Quality
- Intel invests US\$ 740 million in big data firm Cloudera
- dunnhumby acquires big data tech firm Sociomantic

KEY

- Other
- New business
- Standards and governments affairs
- Merger / acquisition / alliance
- Appointments / people

05 MAY

- Gartner posts 10% increase in Q1 revenue
- **SurveyMonkey opens first Asia Pacific office in Australia**
- **European Court of Justice rules that Google must respect 'right to be forgotten'**
- **Google offers link removal form to comply with EU 'right to be forgotten'**
- **WPP acquires Africa's largest digital marketing agency, Quirk**
- **Kantar sells call centre business to BPO specialist**
- **Millward Brown to acquire Romanian agency Daedalus**
- **GfK takes majority stake in Genius Digital**
- **App Annie buys European mobile analytics rival Distimo**
- **Former researcher Mark Fields becomes Ford CEO**
- **FocusVision buys Revelation to merge qual technology**
- **George Terhanian named group president and CRO at NPd**
- **Steve Coffey named NPd Group CIO**

07 JULY

- Ipsos' half-year results show 5.9% drop in revenue
- **Kantar Worldpanel launches in Egypt**
- **GfK wins Morocco TV audience measurement tender**
- **Nielsen expands to Bolivia and Paraguay**
- **Asia Market Development (AMD) launches Chinese research community**
- **Toluna parent company ITWP acquires Harris Interactive Europe**
- **Yahoo acquires app analytics firm Flurry**
- **Ernst & Young acquires Sweeney Research**

06 JUNE

- ComScore tracking suit settlement figure pegged at US\$ 14 million
- Schlesinger and M/A/R/C fund new young professionals grant
- Rwanda's first female researchers receive MRS accreditation
- **On Device Research introduces mobile metrics**
- **Hall & Partners launches predictive modelling platform**
- **ESOMAR and WAPOR consult on updated ESOMAR/WAPOR Guideline on Opinion Polls and Published Surveys**
- **New UK copyright laws give researchers right to 'data mine'**

8. ANNEX

The methodology, national, regional, and global figures, data on client spend, spend by research method, project and design. Also data on GDP growth, exchange rates and inflation.



8.1 METHODOLOGY

The ESOMAR Global Market Research study measures market research turnover of the industry at national, regional and global levels and covers work conducted by market research companies or institutes. It does not include work conducted by non-commercial institutes (e.g. universities and government departments) and research performed by non-research companies (e.g. advertising agencies and management consultancies) that use their own resources for carrying out research. To avoid double counting of international research turnover, work subcontracted to research companies outside the country is not included in the statistical analysis of the domestic research turnover.

The data

The data was provided by national market research associations, leading companies, independent analysts and ESOMAR representatives from around the world. Estimates have been validated by cross-checking between sources. Partial market turnover data was available for countries comprising less than half a percent of the global market. GDP growth derived estimates have been used for these countries.

Calculations and presentation of figures

All trends and developments in this report are based on turnover in US Dollars whilst table 8.2.9 shows turnover figures in Euros, too. Most countries reported their turnover in local currency, or in US Dollars and provided the exchange rate used for conversion. The average exchange rate provided by the International Monetary Fund (IMF) was used for conversion into US Dollars and Euros. Growth rates are adjusted for inflation using the IMF's official rates (i.e. average annual changes). To eliminate the effect of exchange rate fluctuations, growth rates are calculated in the following way:

- Absolute and net growth rates per country are based on turnover in local currencies for 2012 and 2013; for the net growth rates, 2012 turnover is adjusted using the local inflation rates for 2013.
- For regional and global rates, the turnover for 2012 and 2013 was converted into US Dollars using the 2013 exchange rate.

Please note that the US Dollar turnover figures in the annex tables have not been corrected for exchange rate fluctuations or inflation, meaning that the presented growth rates cannot be calculated using the values in the report.

Tables

Some questions were not answered by all countries and those that did not answer a question are excluded from the relevant tables. In numerous tables, weighted totals are presented on the proportion of turnover allocated to e.g. different research methods or design. Turnover figures are used for weighting the data of each country that responded to a particular question. Some totals may not add up to 100% due to rounding. ■

8.2 TURNOVER, GROWTH AND PER CAPITA DATA

8.2.1 Global market research turnover and growth rates per region

Growth rates calculated in local currencies, net growth is adjusted using local inflation rates

REGION	Turnover (US\$m)					Absolute growth (%)	Net growth (%)
	2009	2010	2011	2012	2013	2012/13	2012/13
EU 15	11,720	11,710	14,592	13,978	14,177	-0.2	-1.9
New EU member states	564	606	657	654	686	2.0	0.4
Other Europe	802	879	1,037	1,079	1,143	8.1	3.4
Europe total	13,086	13,196	16,286	15,711	16,005	0.4	-1.4
North America	13,641	13,897	14,726	15,067	15,705	4.4	2.9
Asia Pacific	4,525	5,168	5,893	6,237	5,998	3.9	1.6
Latin America	1,403	1,688	1,901	1,979	1,920	6.6	-0.1
Africa	265	334	387	401	382	5.0	-1.2
Middle East	253	261	273	265	277	4.2	-1.2
World	33,173	34,544	39,466	39,660	40,287	2.8	0.7

Figures may not sum to totals due to rounding.

8.2.2 Global growth rate developments

TIME PERIOD	ABSOLUTE GROWTH (%)	NET GROWTH (%)
2009 versus 2008	-3.7%	-4.6%
2010 versus 2009	5.2%	2.8%
2011 versus 2010	3.8%	0.4%
2012 versus 2011	3.2%	0.7%
2013 versus 2012	2.8%	0.7%

8.2.3 Europe 2009-2013 and growth rates on 2012/2013

Growth rates calculated in local currencies, net growth is adjusted using local inflation rates

EUROPE	Turnover (US\$m)					Absolute growth (%)	Net growth (%)
	2009	2010	2011	2012	2013	2012/13	2012/13
EU 15							
United Kingdom	3,248	3,185	5,237	5,076	5,065	1.1	-1.4
Germany	2,897	2,889	3,325	3,321	3,468	1.1	-0.5
France	2,500	2,533	2,793	2,568	2,679	1.1	0.1
Italy	757	771	807	749	717	-7.2	-8.4
Spain	657	684	679	568	558	-5.0	-6.4
Sweden	363	369	427	462	457	-4.9	-4.9
Netherlands	365	359	346	352	375	3.2	0.6
Belgium	197	201	215	197	188	-7.7	-8.8
Denmark	156	155	170	161	168	1.2	0.4
Austria	156	169	188	158	155	-4.6	-6.6
Finland	130	120	126	113	113	-2.9	-5.0
Ireland	95	86	89	93	87	-8.7	-9.1
Greece	107	96	94	76	77	-2.2	-1.3
Portugal	86	86	86	77	62	-22.1	-22.4
Luxembourg	7	7	8	8	8	3.7	2.0
EU 15 total	11,720	11,710	14,592	13,978	14,177	-0.2	-1.9
New EU member states							
Poland	191	227	233	205	217	2.6	1.7
Czech Republic	105	118	120	109	110	0.9	-0.6
Hungary	78	75	91	95	99	2.2	0.5
Romania	47	48	53	93	99	2.0	-1.9
Bulgaria	29	31	38	43	47	5.7	5.3
Slovakia	28	28	32	31	33	2.4	0.9
Croatia	26	24	25	23	25	3.4	1.2
Slovenia	18	18	19	17	17	-3.3	-4.9
Lithuania	16	13	14	14	15	3.6	2.4
Estonia	13	13	14	14	14	-0.4	-3.8
Latvia	7	8	14	8	8	1.8	1.7
Cyprus	4	4	4	3	2	-36.7	-36.9
New EU member states total	564	606	657	654	686	2.0	0.4
Other Europe							
Russia	258	315	361	391	429	13.0	5.8
Switzerland	202	196	242	235	238	0.0	0.2
Turkey	123	147	186	187	200	12.9	5.0
Norway	142	148	159	146	145	0.6	-1.5
Other European Countries	34	37	48	61	69	12.9	2.0
Ukraine	44	37	42	58	61	7.9	8.2
Other Europe total	802	879	1,037	1,079	1,143	8.1	3.4
Europe	13,086	13,196	16,286	15,711	16,005	0.4	-1.4

8.2.4 North America 2009-2013 and growth rates on 2012/2013

Growth rates calculated in local currencies, net growth is adjusted using local inflation rates

NORTH AMERICA	Turnover (US\$m)					Absolute growth (%)	Net growth (%)
	2009	2010	2011	2012	2013	2012/13	2012/13
USA	13,042	13,195	13,944	14,388	14,991	4.2	2.7
Canada	599	702	782	679	714	8.4	7.4
North America	13,641	13,897	14,726	15,067	15,705	4.4	2.9

Figures may not sum up to totals due to rounding.

8.2.5 Asia Pacific 2009-2013 and growth rates on 2012/2013

Growth rates calculated in local currencies, net growth is adjusted using local inflation rates

ASIA PACIFIC	Turnover (US\$m)					Absolute growth (%)	Net growth (%)
	2009	2010	2011	2012	2013	2012/13	2012/13
Japan	1,769	1,916	2,126	2,234	1,843	0.9	0.5
China	974	1,192	1,413	1,544	1,686	7.2	4.4
Australia	576	657	737	733	699	2.0	-0.4
South Korea	295	360	372	366	374	-0.7	-2.0
India	174	170	249	263	252	8.4	-1.0
Thailand	114	135	143	154	168	7.6	5.3
Singapore	58	78	100	131	138	4.9	2.5
Indonesia	78	101	120	134	135	12.5	5.7
Hong Kong	88	97	107	119	120	0.8	-3.4
Malaysia	73	91	102	113	115	3.8	1.6
Philippines	70	81	90	100	107	8.5	5.4
Taiwan	86	88	97	99	97	-1.3	-2.1
New Zealand	74	84	97	93	93	-0.7	-1.8
Commonwealth of Independent States	36	41	47	52	58	12.1	6.0
Georgia	2	4	3	4	3	-2.9	-2.4
Vietnam	30	42	53	52	55	3.8	-2.6
Pakistan	12	14	14	18	20	19.3	11.1
Bangladesh	8	9	12	11	16	38.0	28.4
Sri Lanka	5	5	7	7	7	-6.4	-12.5
Cambodia	3	3	4	6	7	14.5	11.2
Myanmar	2	2	2	5	6	58.7	50.0
Laos	1	1	2	3	3	21.7	14.3
Asia Pacific	4,525	5,168	5,893	6,237	5,998	3.9	1.6

Figures may not sum up to totals due to rounding.

Commonwealth of Independent States: Armenia, Azerbaijan, Georgia, Kazakhstan and Uzbekistan.

8.2.6 Latin America 2009-2013 and growth rates on 2012/2013

Growth rates calculated in local currencies, net growth is adjusted using local inflation rates

	Turnover (US\$m)					Absolute growth (%)	Net growth (%)
	2009	2010	2011	2012	2013	2012/13	2012/13
LATIN AMERICA							
Brazil	540	716	777	823	724	3.2	-2.8
Mexico	370	429	465	457	460	-2.4	-5.9
Colombia	111	141	158	171	173	5.5	3.4
Venezuela	123	96	109	134	130	38.9	-1.3
Chile	92	85	101	115	125	10.2	8.3
Argentina	73	89	132	106	117	32.5	19.7
Peru	42	51	63	73	85	18.7	15.5
Ecuador	0	25	25	28	31	11.0	8.1
Uruguay	9	11	13	13	14	8.3	-0.2
Dominican Republic	0	0	11	10	11	16.1	10.8
Costa Rica	8	10	9	10	10	8.0	2.6
Guatemala	8	8	9	9	9	2.5	-1.7
Bolivia	6	6	7	7	8	9.5	3.6
Panama	6	7	6	6	7	11.2	6.9
Paraguay	3	4	5	5	6	16.0	13.0
El Salvador	6	6	5	5	5	1.6	0.8
Honduras	2	3	3	3	3	0.8	-4.2
Nicaragua	2	2	3	3	3	1.6	-5.4
Latin America	1,403	1,688	1,901	1,979	1,920	6.6	-0.1

Figures may not sum up to totals due to rounding.

8.2.7 Africa 2009-2013 and growth rates on 2012/2013

Growth rates calculated in local currencies, net growth is adjusted using local inflation rates

	Turnover (US\$m)					Absolute growth (%)	Net growth (%)
	2009	2010	2011	2012	2013	2012/13	2012/13
AFRICA							
South Africa	156	219	254	249	219	3.6	-2.0
West Africa	46	48	59	67	73	9.0	7.3
Nigeria	19	27	35	46	54	14.3	5.3
East Africa	34	35	36	45	46	3.3	-11.4
Kenya	0	30	23	30	27	-8.8	-13.7
Maghreb	20	22	25	25	27	4.4	1.1
Sadec	9	11	13	15	17	13.0	4.5
Africa	265	334	387	401	382	5.0	-1.2

Figures may not sum up to totals due to rounding.

West Africa: Nigeria, Ivory Coast, Senegal, Cameroon, Ghana, Benin, Togo and Mali.

East Africa: Kenya, Sudan, Tanzania, Uganda, Rwanda and Burundi.

Maghreb: Algeria, Morocco, Tunisia.

Sadec: Angola, Botswana, Lesotho, Malawi, Mozambique, Namibia, Swaziland, Zambia.

8.2.8 Middle East 2009-2013 and growth rates on 2012/2013

Growth rates calculated in local currencies, net growth is adjusted using local inflation rates

	Turnover (US\$m)					Absolute growth (%)	Net growth (%)
	2009	2010	2011	2012	2013	2012/13	2012/13
MIDDLE EAST							
GCC	113	116	135	148	159	7.2	4.4
Israel	51	53	50	46	49	0.0	-1.5
Egypt	36	37	36	34	31	-1.7	-8.0
Iran	22	22	31	20	24	20.0	-11.2
Levant	12	13	14	8	9	12.5	8.0
Lebanon	4	6	7	5	7	43.3	38.9
Iraq	20	20	7	9	5	-44.4	-45.5
Middle East	253	261	273	265	277	4.2	-1.2

Figures may not sum up to totals due to rounding.

GCC (Gulf Cooperation Council): Bahrain, Kuwait, Oman, Qatar, Saudi Arabia, United Arab Emirates.

Iran and Iraq were previously reported under 'Other Middle East' but have been taken out of this group as new information has become available. In Yemen, the third country in this group, there were no market research activities in previous years.

Levant: Jordan, Lebanon and Syria.

8.2.9 Countries ranked by market size

COUNTRY	Turnover in US\$ million					Turnover in EUR million				
	2009	2010	2011	2012	2013	2009	2010	2011	2012	2013
1 USA	13,042	13,195	13,944	14,388	14,991	9,364	9,944	10,021	11,186	11,287
2 United Kingdom	3,248	3,185	5,237	5,076	5,065	2,332	2,400	3,764	3,947	3,813
3 Germany	2,897	2,889	3,325	3,321	3,468	2,080	2,177	2,390	2,582	2,611
4 France	2,500	2,533	2,793	2,568	2,679	1,795	1,909	2,007	1,996	2,017
5 Japan	1,769	1,916	2,126	2,234	1,843	1,270	1,444	1,528	1,737	1,387
6 China	974	1,192	1,413	1,544	1,686	699	898	1,015	1,201	1,269
7 Brazil	540	716	777	823	724	388	539	559	640	545
8 Italy	757	771	807	749	717	543	581	580	582	540
9 Canada	599	702	782	679	714	430	529	562	528	538
10 Australia	576	657	737	733	699	414	495	530	570	526
11 Spain	657	684	679	568	558	472	515	488	442	420
12 Netherlands	365	359	346	352	478	262	271	249	274	360
13 Mexico	370	429	465	457	460	266	324	334	355	346
14 Sweden	363	369	427	462	457	261	278	307	359	344
15 Russia	258	315	361	391	429	186	237	259	304	323
16 South Korea	295	360	372	366	374	212	271	268	285	282
17 India	174	170	249	263	252	125	128	179	204	190
18 Switzerland	202	196	242	235	238	145	148	174	183	179
19 South Africa	156	219	254	249	219	112	165	182	193	165
20 Poland	191	227	233	205	217	137	171	168	159	163
21 Turkey	123	147	186	187	200	88	111	134	146	150
22 Belgium	197	201	215	197	188	142	151	155	153	141
23 Colombia	111	141	158	171	173	80	106	114	133	130
24 Denmark	156	155	170	161	168	112	117	122	125	126
25 Thailand	114	135	143	154	168	82	102	103	120	126
26 Austria	156	169	188	158	155	112	127	135	123	117
27 Norway	142	148	159	146	145	102	111	114	113	109
28 Singapore	58	78	100	131	138	42	59	72	102	104
29 Indonesia	78	101	120	134	135	56	76	87	104	102
30 Venezuela	123	96	109	134	130	88	72	78	104	98
31 Chile	92	85	101	115	125	66	64	72	90	94
32 Hong Kong	88	97	107	119	120	63	73	77	93	90
33 Argentina	73	89	132	106	117	53	67	95	83	88
34 Malaysia	73	91	102	113	115	52	68	73	88	86
35 Finland	130	120	126	113	113	94	90	91	88	85
36 Czech Republic	105	118	120	109	110	75	89	86	85	83
37 Philippines	70	81	90	100	107	50	61	65	77	81
38 Hungary	78	75	91	95	99	56	56	65	74	75
39 Romania	47	48	53	93	99	34	36	38	72	74
40 Taiwan	86	88	97	99	97	62	66	70	77	73
41 New Zealand	74	84	97	93	93	53	64	69	72	70

Some turnover figures have been updated since last year's publication. Figures may not sum up to totals due to rounding.

COUNTRY	Turnover in US\$ million					Turnover in EUR million				
	2009	2010	2011	2012	2013	2009	2010	2011	2012	2013
42 Ireland	95	86	89	93	87	68	65	64	72	66
43 Peru	42	51	63	73	85	30	38	45	57	64
44 Greece	107	96	94	76	77	77	72	67	59	58
45 Portugal	86	86	86	77	62	62	65	62	60	47
46 Ukraine	44	37	42	58	61	31	28	30	45	46
47 Vietnam	30	42	53	52	55	22	32	38	41	41
48 Nigeria	19	27	35	46	54	14	21	25	36	41
49 Israel	51	53	50	46	49	36	40	36	36	37
50 Bulgaria	29	31	38	43	47	21	23	27	33	35
51 Slovakia	28	28	32	31	33	na	23	23	24	25
52 Egypt	36	37	36	34	31	14	21	26	26	23
53 Ecuador	na	25	25	28	31	0	19	18	21	23
54 Kenya	na	30	23	30	27	0	23	17	23	20
55 Croatia	26	24	25	23	25	na	19	18	18	19
56 Iran	22	22	31	20	24	16	17	22	16	18
57 Pakistan	12	14	14	18	20	8	11	10	14	15
58 Slovenia	18	18	19	17	17	13	13	13	13	13
59 Bangladesh	8	9	12	11	16	6	6	9	9	12
60 Lithuania	16	13	14	14	15	12	10	10	11	11
61 Estonia	13	13	14	14	14	10	10	10	11	11
62 Uruguay	9	11	13	13	14	6	9	9	10	11
63 Dominican Republic	0	0	11	10	11	0	0	8	8	8
64 Costa Rica	8	10	9	10	10	6	8	6	7	8
65 Guatemala	8	8	9	9	9	6	6	6	7	7
66 Latvia	7	8	14	8	8	5	6	10	6	6
67 Luxembourg	7	7	8	8	8	5	5	6	6	6
68 Bolivia	6	6	7	7	8	4	5	5	5	6
69 Sri Lanka	5	5	7	7	7	3	4	5	6	5
70 Lebanon	4	6	7	5	7	3	4	5	4	5
71 Panama	6	7	6	6	7	4	5	4	5	5
72 Cambodia	3	3	4	6	7	2	3	3	4	5
73 Myanmar	2	2	2	5	6	1	2	1	3	5
74 Paraguay	3	4	5	5	6	2	3	4	4	5
75 El Salvador	6	6	5	5	5	4	4	4	4	4
76 Iraq	20	20	7	9	5	14	15	5	7	4
77 Georgia	2	4	3	4	3	1	3	2	3	3
78 Honduras	2	3	3	3	3	2	2	2	2	2
79 Laos	1	1	2	3	3	1	1	1	2	2
80 Nicaragua	2	2	3	3	3	2	2	2	2	2
81 Cyprus	4	4	4	3	2	3	3	3	2	1

The Netherlands has significantly revised its market size estimate following the introduction of a more thorough approach to measuring turnover of the total market research industry. For consistency reasons, the growth rates that are presented for the Netherlands in this report

do not take into account the additional company turnover measured (+US\$ 103 million) and represent organic growth only. However, the new market estimate has been used in table 8.2.9. For 2014, growth data will be based on the revised market estimates for both 2013 and 2014.

8.2.10 Market research and advertising spend per capita

	COUNTRY	MR turnover in 2013 (US\$m)	Adspend* in 2013 (US\$m)	Population** in 2013 (m)	MR spend per capita (US\$)	Ad spend per capita (US\$)	MR as % of ad spend
1	Argentina	117	4,914	41	2.82	118.42	2.4%
2	Australia	699	12,965	23	30.10	558.67	5.4%
3	Austria	155	4,182	8	18.32	492.89	3.7%
4	Bangladesh	16	na	156	0.10	na	na
5	Belgium	188	3,369	11	16.82	301.78	5.6%
6	Bolivia	8	na	11	0.69	na	na
7	Brazil	724	16,817	198	3.65	84.81	4.3%
8	Bulgaria	47	578	7	6.45	79.90	8.1%
9	Cambodia	7	na	15	0.43	na	na
10	Canada	714	13,663	35	20.34	389.20	5.2%
11	Chile	125	1,422	18	7.11	81.01	8.8%
12	China	1,686	44,821	1,361	1.24	32.94	3.8%
13	Colombia	173	na	47	3.67	na	na
14	Costa Rica	10	na	5	2.19	na	na
15	Croatia	25	na	4	5.75	na	na
16	Cyprus	2	na	1	2.15	na	na
17	Czech Republic	110	na	11	10.48	na	na
18	Denmark	168	2,176	6	30.03	389.21	7.7%
19	Ecuador	31	na	16	1.95	na	na
20	Egypt	31	747	84	0.37	8.87	4.2%
21	El Salvador	5	na	6	0.85	na	na
22	Estonia	14	101	1	10.96	78.85	13.9%
23	Finland	113	1,768	5	20.71	324.27	6.4%
24	France	2,679	16,685	64	42.09	262.10	16.1%
25	Georgia	3	na	4	0.75	na	na
26	Germany	3,468	24,863	81	42.92	307.71	13.9%
27	Greece	77	1,345	11	6.96	121.59	5.7%
28	Guatemala	9	228	15	0.58	14.76	3.9%
29	Honduras	3	na	8	0.38	na	na
30	Hong Kong	120	5,476	7	16.57	755.99	2.2%
31	Hungary	99	828	10	10.07	83.84	12.0%
32	India	252	4,884	1,243	0.20	3.93	5.2%
33	Indonesia	135	6,991	248	0.55	28.19	1.9%
34	Iran	24	na	77	0.31	na	na
35	Ireland	87	na	5	18.28	na	na
36	Israel	49	1,045	8	6.23	132.79	4.7%
37	Italy	717	9,615	60	12.02	161.10	7.5%
38	Kenya	27	1,097	44	0.60	24.73	2.4%
39	Japan	1,843	39,827	127	14.47	312.76	4.6%
40	Laos	3	na	7	0.44	na	na

	COUNTRY	MR turnover in 2013 (US\$m)	Adspend* in 2013 (US\$m)	Population** in 2013 (m)	MR spend per capita (US\$)	Ad spend per capita (US\$)	MR as % of ad spend
41	Latvia	8	na	2	4.06	na	na
42	Lebanon	7	518	4	1.52	115.87	1.3%
43	Lithuania	15	131	3	5.09	44.15	11.5%
44	Luxembourg	8	na	1	15.08	na	na
45	Malaysia	115	na	30	3.88	na	na
46	Mexico	460	na	118	3.89	na	na
47	Myanmar	6	na	65	0.10	na	na
48	Netherlands	375	na	17	22.32	na	na
49	New Zealand	93	1,772	4	20.84	395.67	5.3%
50	Nicaragua	3	115	6	0.44	18.75	2.3%
51	Nigeria	54	na	169	0.32	na	na
52	Norway	145	3,141	5	28.52	616.41	4.6%
53	Pakistan	20	na	183	0.11	na	na
54	Panama	7	na	4	1.78	na	na
55	Paraguay	6	na	7	0.89	na	na
56	Peru	85	715	31	2.74	23.10	11.9%
57	Philippines	107	na	97	1.10	na	na
58	Poland	217	2,748	39	5.62	71.30	7.9%
59	Portugal	62	2,845	11	5.85	268.04	2.2%
60	Romania	99	447	21	4.64	21.01	22.1%
61	Russia	429	11,223	143	3.00	78.52	3.8%
62	Singapore	138	na	5	25.48	na	na
63	Slovakia	33	na	5	6.13	na	na
64	Slovenia	17	275	2	8.19	133.56	6.1%
65	South Africa	219	4,327	53	4.14	81.68	5.1%
66	South Korea	374	na	50	7.45	na	na
67	Spain	558	5,664	47	11.97	121.51	9.8%
68	Sri Lanka	7	na	21	0.33	na	na
69	Sweden	457	3,915	10	47.42	406.32	11.7%
70	Switzerland	238	4,064	8	29.77	507.77	5.9%
71	Taiwan	97	2,086	23	4.15	89.24	4.6%
72	Thailand	168	4,001	68	2.46	58.63	4.2%
73	Turkey	200	na	76	2.61	na	na
74	United Kingdom	5,065	24,526	64	79.03	382.70	20.6%
75	Ukraine	61	1,205	45	1.34	26.57	5.0%
76	Uruguay	14	na	3	4.13	na	na
77	USA	14,991	158,551	316	47.38	501.15	9.5%
78	Venezuela	130	na	30	4.35	na	na
79	Vietnam	55	1,073	90	0.61	11.96	5.1%

* Source: WARC

** Source: IMF

8.2.11 International subcontracting 2013

	Turnover within the country (%)	Subcontracted outside the country (%)	Turnover within the country (US\$m)	Subcontracted outside the country (US\$m)	Total Turnover (US\$m)
COUNTRY	2013	2013	2013	2013	2013
Argentina	80	20	117	29	146
Australia	90	10	699	78	776
Austria	90	10	155	17	173
Bangladesh	85	15	16	3	19
Belgium	83	17	188	38	226
Brazil	85	15	724	128	852
Canada	95	5	714	38	752
Croatia	93	7	25	2	26
Cyprus	95	5	2	0	2
Czech Republic	91	9	110	11	121
Ecuador	97	4	31	1	32
Egypt	86	14	31	5	36
El Salvador	85	15	5	1	6
Finland	85	15	113	20	133
France	96	4	2,679	112	2,791
Georgia	65	35	3	2	5
Germany	37	63	3,468	5,905	9,372
Greece	97	3	77	2	79
Guatemala	94	6	9	1	9
Honduras	90	10	3	0	3
Hong Kong	70	30	120	51	171
India	92	8	252	22	274
Italy	90	10	717	80	797
Japan	98	2	1,843	38	1,880
Kenya	71	29	27	11	38
Lebanon	84	16	7	1	8

	Turnover within the country (%)	Subcontracted outside the country (%)	Turnover within the country (US\$m)	Subcontracted outside the country (US\$m)	Total Turnover (US\$m)
COUNTRY	2013	2013	2013	2013	2013
Malaysia	94	6	115	7	122
Netherlands	96	4	375	16	390
New Zealand	79	21	93	25	118
Nicaragua	85	15	3	0	3
Nigeria	92	8	54	5	59
Pakistan	98	2	20	0	21
Panama	85	15	7	1	8
Peru	96	4	85	4	88
Poland	94	6	217	14	230
Portugal	85	15	62	11	73
Romania	90	10	99	11	110
Russia	97	3	429	13	443
Singapore	55	45	138	113	250
Slovenia	90	10	17	2	19
South Africa	92	8	219	19	238
South Korea	80	20	374	94	468
Spain	96	4	558	23	581
Sri Lanka	99	1	7	0	7
Sweden	93	7	457	34	491
Switzerland	92	8	238	21	259
Taiwan	97	3	97	3	100
Turkey	92	8	200	17	217
Ukraine	95	5	61	3	64
Uruguay	98	2	14	0	14
Vietnam	75	25	55	18	73

Please note that not all countries provided data.

Turnover within the country is used in the turnover, growth and per capita data tables to avoid double counting of international turnover.

Within country: All research conducted inside the country, including fieldwork with national respondents and fieldwork conducted from the country to international respondents, via online, telephone, desk research.

8.3 SOURCES OF RESEARCH TURNOVER

8.3.1 Domestic versus international clients

COUNTRY	DOMESTIC CLIENTS (%)	INTERNATIONAL CLIENTS (%)
Argentina	70	30
Australia	92	8
Austria	85	15
Bangladesh	80	20
Belgium	70	30
Brazil	90	10
Bulgaria	50	50
Costa Rica	65	35
Cyprus	60	40
Czech Republic	75	25
Ecuador	85	15
Egypt	70	30
El Salvador	65	35
Finland	85	15
France	83	17
Georgia	80	20
Germany	65	35
Greece	85	15
Guatemala	40	60
Honduras	20	80
India	68	32
Indonesia	85	15
Italy	90	10
Japan	97	3
Kenya	55	45
Lebanon	76	24

COUNTRY	DOMESTIC CLIENTS (%)	INTERNATIONAL CLIENTS (%)
Malaysia	85	15
Mexico	89	11
Netherlands	86	14
New Zealand	95	5
Nicaragua	40	60
Nigeria	48	52
Pakistan	90	10
Panama	70	30
Peru	88	12
Poland	75	25
Portugal	90	10
Romania	80	20
Russia	70	30
Singapore	80	20
Slovenia	76	24
South Africa	90	10
South Korea	97	3
Spain	80	20
Sri Lanka	80	20
Sweden	81	19
Switzerland	86	14
Taiwan	90	10
Turkey	88	12
Ukraine	98	2
Uruguay	23	77
Vietnam	90	10
Weighted total	81	19

8.3.2 Domestic versus international projects

COUNTRY	DOMESTIC CLIENTS (%)	INTERNATIONAL CLIENTS (%)
Austria	85	15
Bangladesh	90	10
Belgium	67	33
Brazil	80	20
Bulgaria	57	43
Canada	75	25
Costa Rica	75	25
Cyprus	95	5
Czech Republic	85	15
Ecuador	95	5
Egypt	98	2
El Salvador	85	15
Finland	80	20
France	88	12
GCC	80	20
Georgia	75	25
Germany	69	31
Greece	87	13
Guatemala	50	50
Honduras	20	80
Hong Kong	80	20
Kenya	84	16

COUNTRY	DOMESTIC CLIENTS (%)	INTERNATIONAL CLIENTS (%)
Lebanon	76	24
Malaysia	85	15
New Zealand	90	10
Nicaragua	95	5
Nigeria	85	15
Pakistan	80	20
Panama	70	30
Peru	95	5
Poland	91	9
Portugal	90	10
Romania	91	9
Russia	94	6
Singapore	75	25
Slovenia	82	18
South Africa	93	7
South Korea	95	5
Spain	84	16
Taiwan	90	10
Turkey	98	2
United Kingdom	62	38
Uruguay	97	3
Vietnam	95	5
Weighted total	75	25

Please note that not all countries provided data. Figures may not add up to 100% due to rounding.

Domestic projects: fieldwork conducted with respondents in home country.

International projects: fieldwork conducted with respondents in one country or more, including the home country.

8.3.3 Spend by client type (%)

COUNTRY	Manufacturing	Business to business	Wholesale and retail	Financial services	Utilities	Telecommunications	Public sector	Media	Advertising agencies	Research institutes	Other
Australia	28	0	8	11	5	6	20	5	0	0	17
Bangladesh	38	6	10	15	4	20	2	4	1	0	0
Belgium	0	15	45	6	2	5	10	8	2	2	5
Brazil	27	10	25	7	2	4	9	8	3	3	2
Bulgaria	2	5	15	5	1	5	10	10	10	37	0
Canada	25	12	7	18	2	6	9	14	1	6	0
Costa Rica	20	5	20	10	0	10	10	15	10	0	0
Cyprus	5	7	18	5	0	5	3	15	12	30	0
Czech Republic	52	5	7	7	1	5	4	9	1	6	3
Egypt	60	2	3	6	1	15	1	5	2	5	0
El Salvador	36	5	7	12	2	16	6	3	7	2	4
Finland	32	14	10	5	5	7	6	12	4	1	4
France	50	1	9	6	2	3	5	5	3	5	11
GCC	57	4	5	8	2	15	2	3	2	0	2
Georgia	12	0	1	30	1	3	11	19	8	0	15
Germany	57	4	3	3	1	13	3	10	0	3	3
Greece	52	1	3	4	1	9	2	8	6	11	3
Guatemala	42	7	6	6	5	6	7	8	5	8	0
Honduras	30	3	8	10	7	22	6	5	4	2	3
Hong Kong	37	5	5	15	10	5	8	9	2	1	3
India	59	0	0	0	0	0	5	2	1	20	13
Indonesia	65	3	7	9	1	6	1	5	1	2	0
Italy	71	0	0	4	5	6	4	7	3	0	0
Japan	36	3	3	2	4	0	6	10	17	14	5
Kenya	45	5	9	6	4	7	5	7	4	8	0
Lebanon	21	2	3	7	1	6	3	29	15	6	7

COUNTRY	Manufacturing	Business to business	Wholesale and retail	Financial services	Utilities	Telecommunications	Public sector	Media	Advertising agencies	Research institutes	Other
Malaysia	54	6	2	5	6	5	9	9	2	1	1
New Zealand	20	13	18	12	2	7	20	7	1	0	0
Nicaragua	32	4	9	10	7	21	11	3	3	0	0
Nigeria	40	12	2	2	3	10	15	4	7	4	1
Pakistan	35	5	5	5	5	10	20	10	5	0	0
Panama	25	8	10	25	3	13	7	4	5	0	0
Peru	53	7	12	8	1	4	6	6	3	0	0
Poland	54	1	5	5	1	5	9	8	2	5	5
Portugal	60	5	10	5	1	5	1	4	2	4	3
Romania	38	3	6	9	1	7	8	6	1	20	1
Russia	49	4	9	7	1	8	7	7	3	3	2
Singapore	40	5	2	15	3	5	15	5	3	0	7
Slovenia	18	3	8	5	4	5	7	28	9	10	3
South Africa	63	1	3	9	1	6	4	3	2	3	5
South Korea	36	5	4	4	2	3	28	3	5	5	5
Spain	45	1	5	3	3	6	7	8	4	11	7
Sri Lanka	47	6	5	12	0	14	5	3	3	0	5
Switzerland	28	8	6	9	4	4	18	9	8	4	2
Taiwan	50	5	5	8	5	5	10	9	2	1	0
Turkey	54	4	6	6	0	11	5	5	2	2	5
United Kingdom	43	6	5	7	2	14	14	8	0	0	1
Ukraine	70	1	2	5	1	4	4	10	2	1	0
Uruguay	44	0	3	3	2	6	10	1	10	11	10
USA	42	6	3	7	0	2	8	22	2	0	8
Vietnam	70	5	2	5	0	5	0	10	3	0	0
Weighted total	44	5	5	6	1	6	8	14	3	2	6

Please note that not all countries provided data. Figures may not add up to 100% due to rounding.

Utilities: includes gas, electricity, water and postal services whether public or privately owned

Public sector: includes social research, government departments (national or local), academic and public institutions

Media/entertainment: includes broadcast media (TV, radio, cable etc., whether public or privately owned), on-line companies (e.g. Portals, ISPs) and any other media

Research institutes: includes those who offer syndicated services such as retail scanning

Other: includes all other services e.g. charity, travel & tourism, sport & leisure, catering & hospitality, other professional services, etc.

8.3.4 Spend by client type – breakdown of manufacturing clients (%)

COUNTRY	Consumer Non-Durables	Consumer Durables	Pharmaceutical Products & Services	Automotive	Other Manufacturing	Total Manufacturing
Australia	13	0	7	4	4	28
Bangladesh	25	3	5	2	3	38
Brazil	13	5	3	4	2	27
Bulgaria	1	0	1	0	0	2
Canada	14	0	9	2	0	25
Costa Rica	10	3	5	2	0	20
Cyprus	2	2	1	0	0	5
Czech Republic	40	1	6	3	2	52
Egypt	42	3	9	5	1	60
El Salvador	27	5	1	1	2	36
Finland	20	4	3	3	2	32
France	40	1	5	4	0	50
GCC	44	5	2	6	0	57
Georgia	10	1	1	0	0	12
Germany	31	4	10	9	3	57
Greece	44	1	5	1	1	52
Guatemala	31	4	5	2	0	42
Honduras	22	5	1	1	1	30
Hong Kong	25	6	3	3	0	37
Indonesia	50	4	3	7	1	65
Italy	33	12	23	3	0	71
Japan	10	4	17	3	2	36
Kenya	25	5	5	1	9	45
Lebanon	13	5	1	1	1	21
Malaysia	34	5	5	6	4	54

COUNTRY	Consumer Non-Durables	Consumer Durables	Pharmaceutical Products & Services	Automotive	Other Manufacturing	Total Manufacturing
New Zealand	15	2	1	1	1	20
Nicaragua	25	3	2	2	0	32
Nigeria	25	3	6	3	3	40
Pakistan	31	1	1	1	1	35
Panama	13	7	4	1	0	25
Peru	39	4	4	5	1	53
Poland	42	2	7	2	1	54
Portugal	32	4	20	2	2	60
Romania	27	2	7	2	0	38
Russia	26	3	11	8	1	49
Singapore	23	5	6	6	0	40
Slovenia	9	2	3	4	0	18
South Africa	50	4	6	3	0	63
South Korea	15	10	2	7	2	36
Spain	30	8	7	0	0	45
Sri Lanka	40	2	2	1	2	47
Switzerland	18	3	7	0	0	28
Taiwan	25	10	5	7	3	50
Turkey	42	2	3	5	2	54
Ukraine	61	1	8	0	0	70
United Kingdom	32	0	7	4	0	43
Uruguay	41	0	0	3	0	44
USA	16	3	17	4	2	42
Vietnam	46	5	18	1	0	70
Weighted total	23	3	12	4	2	44

Please note that not all countries provided data. Figures may not add up to 100% due to rounding.

8.3.5 Spend by client type – breakdown of consumer non-durables (%)

COUNTRY	Beverages	Food	OTC medicines, Cosmetics and Hygiene	Tobacco	Confectionery	Other consumer Non-Durables	Total Consumer Non-Durables
Brazil	4	2	4	1	1	1	13
Costa Rica	4	3	0	3	0	0	10
Czech Republic	11	14	4	5	3	3	40
Egypt	7	21	9	2	2	1	42
El Salvador	14	8	2	2	1	0	27
Finland	4	9	3	1	2	1	20
France	5	20	8	1	0	6	40
GCC	5	30	2	5	2	0	44
Georgia	3	2	0	4	1	0	10
Germany	5	11	8	3	3	1	31
Greece	10	10	6	7	5	6	44
Guatemala	12	10	5	2	2	0	31
Honduras	12	5	1	1	1	2	22
Hong Kong	6	6	5	3	3	2	25
Indonesia	10	22	8	9	1	0	50
Kenya	7	7	4	2	2	3	25
Malaysia	6	8	5	4	2	9	34
New Zealand	5	6	1	1	1	1	15
Nicaragua	12	9	2	2	0	0	25

COUNTRY	Beverages	Food	OTC medicines, Cosmetics and Hygiene	Tobacco	Confectionery	Other consumer Non-Durables	Total Consumer Non-Durables
Nigeria	7	2	8	5	0	3	25
Pakistan	7	8	2	12	1	1	31
Panama	7	4	1	0	1	0	13
Peru	10	12	9	2	5	1	39
Poland	10	18	8	1	3	2	42
Romania	7	9	3	7	0	1	27
Russia	2	8	10	2	2	2	26
Singapore	8	8	5	1	1	0	23
Slovenia	3	2	2	1	1	0	9
South Africa	11	13	6	8	3	9	50
South Korea	3	4	3	2	1	2	15
Spain	6	11	8	2	0	3	30
Sri Lanka	12	13	8	4	2	1	40
Switzerland	0	10	5	2	0	1	18
Taiwan	5	5	5	5	5	0	25
Turkey	10	14	4	5	2	7	42
United Kingdom	4	8	0	0	0	20	32
Uruguay	11	18	10	1	1	0	41
Vietnam	10	8	5	16	0	7	46
Weighted total	4	8	3	1	1	6	23

Please note that not all countries provided data. Figures may not add up to 100% due to rounding.

8.4 SPEND BY RESEARCH METHOD AND DESIGN

8.4.1 Spend by research method (%)

COUNTRY	TOTAL QUANTITATIVE	TOTAL QUALITATIVE	OTHER
Argentina	90	9	1
Australia	69	23	8
Austria	80	15	5
Bangladesh	75	20	5
Belgium	80	10	10
Brazil	70	27	3
Bulgaria	85	14	1
Canada	78	22	0
Chile	51	8	41
Costa Rica	65	30	5
Cyprus	65	30	5
Czech Republic	90	9	1
Ecuador	80	17	3
Egypt	75	20	5
El Salvador	70	25	5
Finland	88	11	1
France	74	10	16
GCC	80	15	5
Georgia	60	30	10
Germany	87	12	1
Greece	89	11	0
Guatemala	55	38	7
Honduras	75	22	3
Hong Kong	75	20	5
India	75	10	15
Indonesia	87	12	1
Italy	85	8	7
Japan	86	14	0
Kenya	65	30	5

COUNTRY	TOTAL QUANTITATIVE	TOTAL QUALITATIVE	OTHER
Lebanon	78	14	8
Malaysia	73	22	5
Mexico	73	25	2
Netherlands	90	10	0
New Zealand	80	16	4
Nicaragua	75	23	2
Nigeria	60	35	5
Pakistan	82	16	2
Panama	70	25	5
Peru	74	22	4
Poland	84	14	2
Portugal	80	18	2
Romania	68	26	6
Singapore	75	20	5
Slovenia	85	13	2
South Africa	86	11	3
South Korea	81	17	2
Spain	84	11	5
Sri Lanka	80	15	5
Sweden	86	12	2
Switzerland	86	10	4
Taiwan	70	25	5
Turkey	86	12	2
Ukraine	85	15	0
United Kingdom	67	11	22
Uruguay	78	15	7
USA	68	19	13
Venezuela	92	8	0
Vietnam	85	15	0
Weighted total	74	16	10

Please note that not all countries provided data. Figures may not add up to 100% due to rounding.

8.4.2 Spend by research method – breakdown of quantitative and qualitative methods (%)

COUNTRY	QUANTITATIVE								QUALITATIVE				
	Postal	Telephone	Face-to-face	Online	Online traffic/ audience	Automated digital/ electronic	Other quantitative	Total quantitative	Group discussions	In-depth interviews	Online qualitative research	Other qualitative	Total Qualitative
Australia	2	28	5	34	0	0	0	69	14	7	2	0	23
Austria	5	33	20	20	1	1	0	80	10	4	1	0	15
Bangladesh	0	5	60	3	2	5	0	75	16	4	0	0	20
Belgium	2	9	9	30	5	23	2	80	4	2	3	1	10
Brazil	1	9	32	8	4	16	0	70	16	6	5	0	27
Bulgaria	0	20	20	43	1	1	0	85	6	6	2	0	14
Canada	6	24	3	38	0	1	6	78	20	0	2	0	22
Costa Rica	0	5	30	10	0	20	0	65	20	8	2	0	30
Cyprus	2	35	15	0	0	13	0	65	26	4	0	0	30
Czech Republic	1	20	30	27	5	4	3	90	6	3	0	0	9
Ecuador	0	16	56	8	0	0	0	80	12	5	0	0	17
Egypt	1	15	38	3	1	17	0	75	12	5	1	2	20
El Salvador	0	20	41	6	1	2	0	70	16	5	4	0	25
Finland	8	26	8	32	6	8	0	88	5	3	3	0	11
France	1	11	12	23	0	26	1	74	5	2	2	1	10
GCC	0	13	55	8	2	2	0	80	7	5	3	0	15
Georgia	0	6	40	0	10	0	4	60	21	9	0	0	30
Germany	5	31	19	26	3	3	0	87	5	3	4	0	12
Greece	0	19	20	2	1	38	9	89	9	2	0	0	11
Guatemala	0	15	34	1	0	5	0	55	17	11	1	9	38
Honduras	0	15	50	6	1	3	0	75	15	4	2	1	22
Hong Kong	0	25	15	30	5	0	0	75	14	4	2	0	20
Indonesia	0	6	53	2	5	21	0	87	9	3	0	0	12
Italy	0	16	20	13	0	36	0	85	5	2	1	0	8
Japan	10	1	10	46	0	0	19	86	8	4	1	1	14
Kenya	0	18	42	1	0	4	0	65	19	10	1	0	30
Lebanon	0	24	14	2	0	36	2	78	10	4	0	0	14

COUNTRY	QUANTITATIVE								QUALITATIVE				
	Postal	Telephone	Face-to-face	Online	Online traffic/ audience	Automated digital/ electronic	Other quantitative	Total quantitative	Group discussions	In-depth interviews	Online qualitative research	Other qualitative	Total Qualitative
Malaysia	2	30	23	10	5	3	0	73	17	3	2	0	22
Netherlands	6	15	9	36	0	11	13	90	0	0	0	10	10
New Zealand	1	16	4	27	12	20	0	80	12	3	1	0	16
Nicaragua	0	20	50	5	0	0	0	75	18	4	1	0	23
Nigeria	0	8	42	8	1	1	0	60	15	12	3	5	35
Pakistan	0	2	68	0	0	12	0	82	11	4	1	0	16
Panama	0	22	26	9	0	13	0	70	18	5	2	0	25
Peru	0	27	34	4	4	5	0	74	15	4	1	2	22
Poland	1	11	34	7	1	23	7	84	9	3	1	1	14
Portugal	3	16	16	8	1	32	4	80	11	6	1	0	18
Romania	0	24	28	13	0	1	2	68	16	8	1	1	26
Russia	0	22	17	15	2	15	2	73	13	5	3	3	24
Singapore	0	20	10	30	5	10	0	75	10	5	5	0	20
Slovenia	2	22	19	14	28	0	0	85	7	4	2	0	13
South Africa	5	19	47	3	3	7	2	86	7	2	1	1	11
South Korea	1	18	28	24	2	1	7	81	10	5	1	1	17
Spain	2	16	16	16	1	24	9	84	0	0	1	10	11
Sri Lanka	1	10	65	2	2	0	0	80	12	3	0	0	15
Sweden	12	19	6	38	7	4	0	86	5	3	4	0	12
Switzerland	3	44	24	10	3	0	2	86	5	4	1	0	10
Taiwan	2	17	25	10	15	1	0	70	18	7	0	0	25
Turkey	0	19	52	4	0	11	0	86	8	3	1	0	12
Ukraine	0	26	43	7	0	0	9	85	9	6	0	0	15
United Kingdom	5	9	10	29	0	0	14	67	6	3	2	0	11
Uruguay	1	21	23	0	0	33	0	78	12	2	0	1	15
USA	1	5	0	21	2	35	4	68	16	2	1	0	19
Vietnam	0	0	50	0	0	35	0	85	10	5	0	0	15
Weighted total	3	12	9	24	2	19	5	74	11	3	2	0	16

Please note that not all countries provided data. Figures may not add up to 100% due to rounding.

Telephone includes mobile voice (i.e. telephone surveys including mobile phone respondents)

Online quantitative includes mobile internet

Automated digital/electronic: Retail audits and media measurements (excluding online traffic/audience measurement).

Other quantitative: includes many syndicated services for which breakdowns are not available.

Other qualitative: includes ethnography and other methods for which breakdowns are not available.

8.4.3 Spend by research design (%)

COUNTRY	AD HOC	OMNIBUS	PANEL	OTHER CONTINUOUS	OTHER TYPE OF RESEARCH
Argentina	55	0	45	0	0
Australia	60	2	15	18	5
Austria	60	10	30	0	0
Bangladesh	40	2	20	38	0
Brazil	61	1	29	7	2
Bulgaria	25	5	60	10	0
Costa Rica	50	10	2	28	10
Cyprus	45	5	41	9	0
Czech Republic	58	1	16	25	0
Ecuador	76	8	16	0	0
Egypt	45	2	30	23	0
El Salvador	46	5	5	32	12
Finland	55	8	30	6	1
France	59	2	20	17	2
GCC	73	0	14	13	0
Georgia	64	5	11	20	0
Germany	40	1	40	19	0
Greece	35	0	43	22	0
Guatemala	52	3	17	22	6
Honduras	60	4	4	29	3
Hong Kong	75	2	18	5	0
Indonesia	55	2	28	13	2
Italy	40	1	44	15	0
Japan	58	1	21	11	9
Kenya	57	4	21	12	6

COUNTRY	AD HOC	OMNIBUS	PANEL	OTHER CONTINUOUS	OTHER TYPE OF RESEARCH
Lebanon	44	1	37	10	8
Malaysia	60	2	15	15	8
Netherlands	44	0	30	13	13
New Zealand	48	2	30	20	0
Nicaragua	55	4	4	30	7
Nigeria	60	2	12	20	6
Pakistan	70	2	20	8	0
Panama	50	6	11	33	0
Peru	65	5	22	4	4
Poland	54	2	27	14	3
Portugal	35	20	35	10	0
Romania	66	5	3	26	0
Russia	68	2	19	8	3
Singapore	50	1	20	27	2
Slovenia	47	7	36	9	1
South Africa	60	2	3	35	0
South Korea	62	3	18	16	1
Spain	42	2	37	17	2
Sri Lanka	47	0	28	20	5
Switzerland	60	4	33	2	1
Taiwan	65	2	22	8	3
Turkey	39	2	33	23	3
Ukraine	40	0	48	8	4
Uruguay	42	7	30	1	20
Vietnam	55	0	45	0	0
Weighted total	52	2	28	15	3

8.4.4 Spend by project type (%)

COUNTRY	Market Measurement	Market Modeling	New Product/Service Development	Advertising Pre-Testing (Copy)	Advertising/Brand Tracking	Media Audience/Research	Other Qualitative Studies	Stakeholder Measurement, incl. CRM	Other Omnibus/Shared Cost Surveys	Usage & Attitude Studies	Opinion Research/Polling	Other Business-to-Business Studies	Other
Australia	9	1	15	4	10	3	16	12	3	8	2	6	11
Bangladesh	22	11	13	4	18	4	5	8	2	6	2	5	0
Brazil	25	2	6	4	5	10	21	2	3	9	4	9	0
Bulgaria	3	1	5	15	15	15	1	2	8	15	15	5	0
Costa Rica	25	10	15	5	5	10	10	0	0	20	0	0	0
Cyprus	20	5	15	5	5	5	0	0	0	25	10	10	0
Czech Republic	33	2	10	10	11	15	5	8	1	0	2	2	0
Ecuador	7	0	10	10	15	10	5	3	2	15	20	3	0
Egypt	25	1	10	5	12	8	0	22	2	10	2	3	0
El Salvador	6	4	14	15	31	1	12	2	2	7	3	3	0
Finland	1	1	15	6	10	10	12	20	8	5	5	5	2
France	24	4	7	2	9	0	5	7	2	4	1	0	35
GCC	30	1	10	5	15	2	14	15	0	2	0	0	6
Georgia	15	3	5	3	13	11	9	10	5	13	3	5	5
Germany	8	3	14	3	13	8	10	24	2	3	5	7	0
Greece	42	0	5	3	7	12	6	6	0	8	5	3	3
Guatemala	1	1	8	14	34	4	16	1	3	6	8	4	0
Honduras	10	3	11	13	28	4	4	2	2	15	5	3	0
Hong Kong	5	5	10	5	10	10	15	5	5	15	5	5	5
Kenya	16	3	13	3	13	5	8	4	2	18	8	7	0

COUNTRY	Market Measurement	Market Modeling	New Product/Service Development	Advertising Pre-Testing (Copy)	Advertising/Brand Tracking	Media Audience/Research	Other Qualitative Studies	Stakeholder Measurement, incl. CRM	Other Omnibus/Shared Cost Surveys	Usage & Attitude Studies	Opinion Research/Polling	Other Business-to-Business Studies	Other
Lebanon	25	0	1	2	5	31	13	2	3	5	8	3	2
Malaysia	35	2	7	3	7	5	10	2	2	8	10	5	4
New Zealand	20	1	3	5	18	18	8	5	2	10	2	8	0
Nicaragua	6	1	14	8	20	3	13	2	2	14	9	8	0
Nigeria	18	12	14	2	6	3	15	3	1	12	5	8	1
Pakistan	17	12	5	5	5	5	3	5	2	20	16	5	0
Panama	4	2	10	10	25	5	8	5	2	9	18	2	0
Peru	38	2	8	5	7	10	3	3	3	4	13	4	0
Poland	16	1	15	8	15	4	2	11	2	19	3	0	2
Romania	11	2	14	8	11	6	10	8	3	15	7	5	0
Russia	20	3	19	5	16	11	3	6	2	7	4	4	0
Slovenia	9	2	9	6	13	34	3	6	2	6	7	3	0
South Africa	20	2	10	3	22	11	5	16	1	4	2	0	4
South Korea	12	7	9	6	9	1	9	12	3	9	18	5	0
Sri Lanka	26	2	11	10	11	4	4	13	0	8	2	3	6
Turkey	37	2	10	5	10	3	7	11	1	6	5	2	1
Ukraine	25	5	5	15	10	10	5	3	2	10	0	10	0
Uruguay	45	0	1	0	1	16	0	5	0	14	2	0	16
USA	25	8	8	1	4	18	15	3	1	4	1	7	5
Weighted total	22	6	9	2	7	13	13	7	2	5	2	6	7

Please note that not all countries provided data. Figures may not add up to 100% due to rounding.

Market Measurement: syndicated or custom retail/consumer panel/surveys for market size, share and tracking, including online.

Market Modeling: including marketing mix and media modeling.

New Product/Service Development: testing of concepts, products, services, packaging, pricing, mix, etc. and volume forecasting.

Media Audience/Research: viewing, listening, readership, including on-line.

Stakeholder Measurement, incl. CRM: customer/employee satisfaction and mystery shopping.

Usage & Attitude Studies: including segmentation studies and motivational research

8.5 FIVE-YEAR TREND

8.5.1 Turnover per region 2009-2013

REGION	TURNOVER (US\$M)				
	2009	2010	2011	2012	2013
EU 15	11,720	11,710	14,592	13,978	14,177
New EU member states	564	606	657	654	686
Other Europe	802	879	1,037	1,079	1,143
Europe total	13,086	13,196	16,286	15,711	16,005
North America	13,641	13,897	14,726	15,067	15,705
Asia Pacific	4,525	5,168	5,893	6,237	5,998
Latin America	1,403	1,688	1,901	1,979	1,920
Africa	265	334	387	401	382
Middle East	253	261	273	265	277
World	33,173	34,544	39,466	39,660	40,287

Figures may not sum to totals due to rounding.

8.5.2 Absolute growth rate (unadjusted for inflation) 2009-2013

REGION	ABSOLUTE GROWTH RATE (%)				
	2008/09	2009/10	2010/11	2011/12	2012/13
EU 15	-4.9	2.9	1.3	1.0	-0.2
New EU member states	-5.4	6.8	2.4	-0.6	2.0
Other Europe	-3.0	5.5	9.9	7.7	8.1
Europe total	-4.8	3.3	1.9	1.4	0.4
North America	-3.8	4.8	4.9	2.4	4.4
Asia Pacific	-1.8	5.6	4.7	6.9	3.9
Latin America	1.4	20.4	7.9	3.8	6.6
Africa	-4.0	16.8	2.8	11.8	5.0
Middle East	-4.4	1.7	7.6	-1.3	4.2
World	-3.7	5.2	3.8	3.2	2.8

8.5.3 Net growth rate (adjusted for inflation) 2009-2013

REGION	NET GROWTH RATE (%)				
	2008/09	2009/10	2010/11	2011/12	2012/13
EU 15	-5.6	0.8	-1.7	-1.4	-1.9
New EU member states	-8.1	4.0	-1.3	-4.2	0.4
Other Europe	-8.4	0.7	4.3	2.9	3.4
Europe total	-5.9	1.0	-1.3	-1.2	-1.4
North America	-3.5	3.1	1.7	0.4	2.9
Asia Pacific	-2.2	3.5	1.7	4.8	1.6
Latin America	-4.6	13.9	1.3	5.6	-0.1
Africa	-11.0	10.1	-3.5	3.9	-1.2
Middle East	-9.2	-3.0	1.9	-4.3	-1.2
World	-4.6	2.8	0.4	0.7	0.7

8.6 GDP GROWTH RATES 2009-2013 (%)

COUNTRY	2009	2010	2011	2012	2013
Argentina	0.9	9.2	6.0	1.9	4.3
Australia	1.3	2.7	3.0	3.6	2.4
Austria	-3.6	2.0	2.4	0.8	0.3
Bangladesh	5.4	6.0	6.3	6.1	5.8
Belgium	-3.0	2.0	1.7	-0.2	0.2
Bolivia	3.3	4.2	4.5	5.2	6.8
Brazil	-0.2	7.5	4.5	0.9	2.3
Bulgaria	-5.0	0.1	3.0	0.8	0.9
Cambodia	-2.5	6.0	6.5	6.5	7.0
Canada	-2.6	3.1	2.8	1.8	2.0
Chile	-1.5	5.3	5.9	5.5	4.2
China	8.7	10.3	9.6	7.8	7.7
Colombia	0.1	4.3	4.6	4.0	4.3
Costa Rica	-1.1	4.2	4.3	5.0	3.5
Croatia	-5.8	-1.4	1.3	-2.0	-1.0
Cyprus	-1.7	1.0	1.7	-2.4	-6.0
Czech Republic	-4.3	2.3	1.7	-1.2	-0.9
Denmark	-5.1	2.1	2.0	-0.6	0.4
Dominican Republic	3.5	7.8	5.5	3.9	4.1
Ecuador	0.4	3.2	3.2	5.0	4.2
Egypt	4.7	5.1	1.0	2.2	2.1
El Salvador	-3.5	0.7	2.5	1.6	1.6
Estonia	-14.1	3.1	3.3	3.2	0.8
Finland	-7.8	3.1	3.1	-0.2	-1.4
France	-2.2	1.5	1.6	0.0	0.3
Georgia	-4.0	6.4	5.5	6.5	3.2
Germany	-5.0	3.5	2.5	0.9	0.5
Greece	-2.0	-4.5	-3.0	-6.4	-3.9
Guatemala	0.6	2.6	3.0	3.0	3.5
Honduras	-1.9	2.8	3.5	3.3	2.6
Hong Kong	-2.7	6.8	5.4	1.4	2.9
Hungary	-6.3	1.2	2.8	-1.7	1.1
India	5.7	10.4	8.2	4.0	4.4
Indonesia	4.5	6.1	6.2	6.2	5.8
Iran	1.8	1.0	0.0	-1.9	-1.7
Iraq	4.2	0.8	9.6	8.4	4.2
Ireland	-7.1	-1.0	0.5	0.9	-0.3
Israel	0.7	4.6	3.8	3.1	3.3
Italy	-5.0	1.3	1.1	-2.4	-1.9
Japan	-5.2	3.9	1.4	2.0	1.5
Kenya	2.1	5.0	5.7	4.7	5.6

COUNTRY	2009	2010	2011	2012	2013
Laos	7.6	7.7	7.5	8.3	8.2
Latvia	-18.0	-0.3	3.3	5.6	4.1
Lebanon	9.0	7.5	2.5	1.5	1.0
Lithuania	-15.0	1.3	4.6	3.6	3.3
Luxembourg	-4.2	3.4	3.0	0.1	2.0
Malaysia	-1.7	7.2	5.5	5.6	4.7
Mexico	-6.5	5.5	4.6	3.9	1.1
Myanmar	4.8	5.3	5.5	6.3	7.5
Netherlands	-4.0	1.7	1.5	-0.9	-0.8
New Zealand	-1.6	1.5	0.9	2.5	2.4
Nicaragua	-1.5	4.5	3.5	5.2	4.2
Nigeria	5.6	8.4	6.9	6.3	6.3
Norway	-1.5	0.4	2.9	3.0	0.8
Pakistan	2.0	4.8	2.8	3.7	3.6
Panama	2.4	7.5	7.4	10.7	8.0
Paraguay	-4.5	15.3	5.6	-1.2	13.0
Peru	0.9	8.8	7.5	6.3	5.0
Philippines	0.9	7.3	5.0	6.6	7.2
Poland	1.7	3.8	3.8	2.0	1.6
Portugal	-2.7	1.4	-1.5	-3.2	-1.4
Romania	-7.1	-1.3	1.5	0.3	3.5
Russia	-7.9	4.0	4.8	3.4	1.3
Singapore	-2.0	14.5	5.2	1.3	4.1
Slovakia	-4.7	4.0	3.8	2.0	0.9
Slovenia	-7.3	1.2	2.0	-2.3	-1.1
South Africa	-1.8	2.8	3.5	2.5	1.9
South Korea	0.2	6.1	4.5	2.0	2.8
Spain	-3.6	-0.1	0.8	-1.4	-1.2
Sri Lanka	3.5	9.1	7.0	6.4	7.3
Sweden	-4.4	5.5	3.8	1.2	1.5
Switzerland	-1.5	2.6	2.4	1.0	2.0
Taiwan	-1.9	10.8	5.4	1.3	2.1
Thailand	-2.3	7.8	4.0	6.4	2.9
Turkey	-4.7	8.2	4.6	2.6	4.3
Ukraine	-4.9	1.3	1.7	0.2	1.8
United Arab Emirates	2.9	8.5	5.0	3.8	4.2
United Kingdom	-15.1	4.2	4.5	0.2	0.0
Uruguay	2.9	8.5	5.0	3.8	4.2
USA	-2.4	2.8	2.8	2.2	1.9
Venezuela	-3.3	-1.9	1.8	5.5	1.0
Vietnam	5.3	6.8	6.3	5.0	5.4

Source: IMF - inflation adjusted

8.7 AVERAGE EXCHANGE RATES PER US\$ 2009-2013

COUNTRY	2009	2010	2011	2012	2013
Argentina	3.69	3.90	4.11	4.55	5.48
Australia	1.26	1.09	0.97	0.97	1.03
Austria	0.72	0.75	0.72	0.78	0.75
Bangladesh	68.90	70.09	75.50	79.55	78.85
Belgium	0.72	0.75	0.72	0.78	0.75
Bolivia	6.97	6.96	6.91	6.86	6.86
Brazil	2.00	1.76	1.66	1.84	2.16
Bulgaria	1.41	1.48	1.41	1.52	1.47
Cambodia	4,124.95	4,110.84	4,045.87	4,039.07	3,995.10
Canada	1.14	1.03	0.99	1.00	1.03
Chile	566.25	510.23	483.76	486.49	495.31
China	6.83	6.77	6.46	6.31	6.20
Colombia	2,157.00	1,889.73	1,879.36	1,789.64	1,868.78
Costa Rica	573.00	525.97	506.40	502.91	499.77
Croatia	5.27	5.50	5.34	5.78	5.66
Cyprus	0.72	0.75	0.72	0.78	0.75
Czech Republic	19.06	19.10	17.70	19.58	19.57
Denmark	5.36	5.62	5.37	5.79	5.62
Dominican Republic	35.90	36.80	38.10	38.40	41.74
Ecuador	1.00	1.00	1.00	1.00	1.00
Egypt	5.53	5.52	5.82	6.01	6.46
El Salvador	1.00	1.00	1.00	1.00	1.00
Estonia	11.23	11.47	0.72	0.78	0.75
Finland	0.72	0.75	0.72	0.78	0.75
France	0.72	0.75	0.72	0.78	0.75
Georgia	1.67	1.78	1.69	1.65	1.66
Germany	0.72	0.75	0.72	0.78	0.75
Greece	0.72	0.75	0.72	0.78	0.75
Guatemala	8.16	8.06	7.79	7.83	7.87
Honduras	18.96	18.96	18.96	19.59	20.42
Hong Kong	7.75	7.77	7.78	7.76	7.76
Hungary	201.15	208.73	200.67	225.02	219.85
India	46.45	48.45	50.87	53.44	60.52
Indonesia	10,407.27	9,088.16	8,782.38	9,384.97	10,438.05
Iran	1.00	1.00	1.00	1.00	1.00
Iraq	1.00	1.00	1.00	1.00	1.00
Ireland	0.72	0.75	0.72	0.78	0.75
Israel	3.93	3.81	3.58	3.85	3.61
Italy	0.72	0.75	0.72	0.78	0.75
Japan	93.57	87.78	79.81	79.79	97.60
Kenya	73.29	79.14	86.22	84.53	86.12
Laos	8,497.07	8,472.99	8,040.30	8,112.46	8,224.31

COUNTRY	2009	2010	2011	2012	2013
Latvia	0.50	0.53	0.50	0.55	0.53
Lebanon	1,507.50	1,507.49	1,507.49	1,507.48	1,507.50
Lithuania	2.48	2.60	2.48	2.68	2.51
Luxembourg	0.72	0.75	0.72	0.78	0.75
Malaysia	3.52	3.22	3.06	3.09	3.15
Mexico	13.51	12.64	12.42	13.17	12.77
Myanmar	6.56	6.30	837.70	837.70	965.00
Netherlands	0.72	0.75	0.72	0.78	0.75
New Zealand	1.58	1.39	1.26	1.23	1.22
Nicaragua	20.34	21.36	22.43	23.55	24.73
Nigeria	148.36	149.04	152.99	160.55	155.25
Norway	6.29	6.04	5.60	5.82	5.88
Pakistan	78.64	83.88	85.78	89.07	95.96
Panama	1.00	1.00	1.00	1.00	1.00
Paraguay	4,973.62	4,591.95	4,517.90	4,413.95	4,436.82
Peru	3.01	2.84	2.80	2.64	2.70
Philippines	47.64	45.11	45.68	42.20	42.45
Poland	3.12	3.02	2.96	3.26	3.16
Portugal	0.72	0.75	0.72	0.78	0.75
Romania	3.04	3.18	3.05	3.47	3.33
Russia	31.74	30.37	29.38	30.84	31.76
Singapore	1.45	1.36	1.26	1.25	1.25
Slovakia	0.72	0.75	0.72	0.78	0.75
Slovenia	0.72	0.75	0.72	0.78	0.75
South Africa	8.44	7.32	7.25	8.21	9.65
South Korea	1,276.93	1,156.06	1,108.29	1,126.53	1,094.93
Spain	0.72	0.75	0.72	0.78	0.75
Sri Lanka	118.90	113.04	110.61	127.63	130.05
Sweden	7.65	7.21	6.49	6.78	6.51
Switzerland	1.09	1.04	0.89	0.94	0.93
Taiwan	33.06	31.62	29.47	29.62	29.77
Thailand	34.29	31.69	30.49	31.08	30.73
Turkey	1.55	1.50	1.68	1.80	1.90
Ukraine	7.75	7.94	7.97	7.99	8.16
United Arab Emirates	3.67	3.67	3.67	3.67	3.67
United Kingdom	0.64	0.65	0.62	0.63	0.64
Uruguay	22.56	20.06	19.25	20.31	20.48
USA	1.00	1.00	1.00	1.00	1.00
Venezuela	2.15	3.45	4.29	4.29	6.13
Vietnam	17,800.73	19,125.59	20,656.51	21,243.90	21,014.05

Source: IMF

2009
One Euro = 1,39 US Dollar
One US Dollar = 0,72 Euro

2010
One Euro = 1,33 US Dollar
One US Dollar = 0,75 Euro

2011
One Euro = 1,39 US Dollar
One US Dollar = 0,72 Euro

2012
One Euro = 1,32 US Dollar
One US Dollar = 0,78 Euro

2013
One Euro = 1,35 US Dollar
One US Dollar = 0,75 Euro

8.8 INFLATION RATES 2009-2013 (%)

COUNTRY	2009	2010	2011	2012	2013
Argentina	6.3	10.5	9.8	10.0	10.6
Australia	1.8	2.8	3.4	1.8	2.5
Austria	0.4	1.7	3.6	2.6	2.1
Bangladesh	6.1	8.2	10.7	8.7	7.5
Belgium	-0.2	2.3	3.5	2.6	1.2
Bolivia	3.5	2.5	9.9	4.5	5.7
Brazil	4.9	5.0	6.6	5.4	6.2
Bulgaria	2.5	3.0	3.4	2.4	0.4
Cambodia	-0.7	4.0	5.5	2.9	3.0
Canada	0.3	1.8	2.9	1.5	1.0
Chile	1.7	1.5	3.3	3.0	1.8
China	-0.7	3.3	5.4	2.7	2.6
Colombia	4.2	2.3	3.4	3.2	2.0
Costa Rica	7.8	5.7	4.9	4.5	5.2
Croatia	2.4	1.0	2.3	3.4	2.2
Cyprus	0.2	2.6	3.5	3.1	0.4
Czech Republic	1.0	1.5	1.9	3.3	1.4
Denmark	1.3	2.3	2.8	2.4	0.8
Dominican Republic	1.5	6.3	8.5	3.7	4.8
Ecuador	5.1	3.6	4.5	5.1	2.7
Egypt	16.2	11.7	11.1	8.6	6.9
El Salvador	0.5	1.2	3.6	1.7	0.8
Estonia	-0.1	2.9	5.1	4.2	3.5
Finland	1.6	1.7	3.3	3.2	2.2
France	0.1	1.7	2.3	2.0	1.0
Georgia	1.7	7.1	8.5	-0.9	-0.5
Germany	0.1	1.2	2.5	2.1	1.6
Greece	1.4	4.7	3.1	1.0	-0.9
Guatemala	1.9	3.9	6.2	3.8	4.3
Honduras	5.5	4.7	6.8	5.2	5.2
Hong Kong	0.5	2.4	5.3	4.1	4.3
Hungary	4.2	4.9	3.9	5.7	1.7
India	10.9	13.2	8.6	9.3	9.5
Indonesia	4.8	5.1	5.4	4.3	6.4
Iran	10.3	12.5	21.3	30.6	35.2
Iraq	-2.8	5.1	6.0	6.1	1.9
Ireland	-1.7	-1.6	1.1	1.9	0.5
Israel	3.3	2.7	3.5	1.7	1.5
Italy	0.8	1.6	2.9	3.3	1.3
Japan	-1.4	-0.7	-0.3	0.0	0.4
Kenya	11.8	3.9	14.0	9.4	5.7

COUNTRY	2009	2010	2011	2012	2013
Laos	0.0	5.4	8.7	4.3	6.4
Latvia	3.3	-1.2	4.2	2.3	0.0
Lebanon	1.2	4.5	5.0	6.6	3.2
Lithuania	4.2	1.2	4.1	3.2	1.2
Luxembourg	0.8	2.3	3.4	2.9	1.7
Malaysia	0.6	1.7	3.2	1.7	2.1
Mexico	5.3	4.2	3.4	4.1	3.8
Myanmar	7.9	7.3	4.2	6.1	5.8
Netherlands	1.0	0.9	2.5	2.8	2.6
New Zealand	2.1	2.3	4.0	1.1	1.1
Nicaragua	3.7	5.5	8.1	7.9	7.4
Nigeria	12.4	13.7	10.8	12.2	8.5
Norway	2.2	2.4	1.3	0.7	2.1
Pakistan	20.8	11.7	13.7	11.0	7.4
Panama	2.4	3.5	5.9	5.7	4.0
Paraguay	2.6	4.7	6.6	3.8	2.7
Peru	2.9	1.5	3.4	3.7	2.8
Philippines	3.2	3.8	4.8	3.1	2.9
Poland	3.5	2.6	4.3	3.7	0.9
Portugal	-0.9	1.4	3.6	2.8	0.4
Romania	5.6	6.1	5.8	3.3	4.0
Russia	11.7	6.9	8.4	5.1	6.8
Singapore	0.2	2.8	5.2	4.6	2.4
Slovakia	0.9	0.7	4.1	3.7	1.5
Slovenia	0.8	1.8	1.8	2.6	1.6
South Africa	7.1	4.3	5.0	5.7	5.8
South Korea	2.8	3.0	4.0	2.2	1.3
Spain	-0.3	2.0	3.1	2.4	1.5
Sri Lanka	3.4	5.9	6.7	7.5	6.9
Sweden	2.2	1.9	1.4	0.9	0.0
Switzerland	-0.4	0.7	0.2	-0.7	-0.2
Taiwan	-0.9	1.0	1.4	1.9	0.8
Thailand	-0.8	3.3	3.8	3.0	2.2
Turkey	6.3	8.6	6.5	8.9	7.5
Ukraine	15.9	9.4	8.0	0.6	-0.3
United Arab Emirates	1.0	0.9	0.9	0.7	1.1
United Kingdom	2.2	3.3	4.5	2.8	2.6
Uruguay	7.1	6.7	8.1	8.1	8.6
USA	-0.3	1.6	3.1	2.1	1.5
Venezuela	27.1	28.2	26.1	21.1	40.7
Vietnam	6.7	9.2	18.7	9.1	6.6

Source: IMF

THANK YOU'S

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