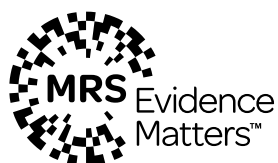


— THE RESEARCH **LIVE** INDUSTRY REPORT 2020

INCLUDING THE NEW MRS LEAGUE TABLES



Toluna 



We are a leading **independent** marketing and media consultancy

Our ambition is to help brands harness the power of data, analytics, and technology to improve marketing outcomes

With 18 offices globally, we offer full coverage of the world's largest advertising markets:

- › Working with 70 of the world's top 100 advertisers
- › 650+ employees in 14 global markets including London, Paris, Madrid, New York, Sydney, Shanghai and Singapore
- › Listed on the London Stock Exchange (AIM:EBQ)

Our consultants and experts work with market-leading local and global brands across three key areas:

- › **Media**
Achieve higher media performance through best-in-class media management and transparency
- › **Analytics**
Build evidence-based marketing programmes rooted in data and analytics
- › **Tech**
Design the right technology ecosystem to drive higher value from digital investments

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ACKNOWLEDGEMENTS

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If you have any queries about this report please contact info@mrs.org.uk or call 020 7490 4911.

INTRODUCTION

Jane Frost, chief executive, MRS



Welcome to the Research Live Industry Report 2020

This report brings together multiple sources of intelligence including the MRS League Tables and highlights from the MRS Industry Survey. The MRS League Tables are built on 2018 financial data submitted and collected in 2019; the data is focused solely on UK-based turnover and international work managed and invoiced from the UK. We have complemented this historic data with the latest trends analysis from the Research Live editorial team.

The industry continued to grow in 2018 at 0.7%, with the top 100 agencies enjoying 3.9% growth. It was also a year of consolidation, as one can expect from an industry that is mature and where profits can still be achieved by delivering work at scale, speed and cost-effectively.

Nevertheless, we remain a sector comprised mainly of both SMEs and indeed micro-businesses, which brings its own challenges.

Access to data has reinvigorated the validity of evidence in decision making, especially at a time of increased risk and disruption for many organisations. Insight teams have an opportunity to re-align and re-define themselves, and are seeking a variety of suppliers and support, not necessarily all under the same roof. A recurring theme in many of the articles in this report is a corresponding need for 'natural born quallies' with face-to-face research skills.

Brains, innovation and creativity are still highly desirable characteristics of any agency and are increasingly recognised as vital if we are to deliver on the promises of data and AI. Indeed, all our evidence still indicates that the holy grail of research talent is a person who combines storytelling and contextual flair, business acumen, an understanding of data analytics and who is both agile and creative!

As critical to its financial success is the industry's work on inclusion. This year we begin the process of reporting back on the progress that the sector has made in this area. While the sector closely reflects the national gender pay gap we need to do better to prove that we really offer a mirror on the world, across the entire inclusion agenda.

This is a frank report which not only gives you a shape and size of the research industry, but holds it to account. We should not however forget that we are a worth well over £5bn, which makes us bigger than many other sectors that attract more publicity.. This is why we end the report on a case study with an award winning business which demonstrates that there is still plenty of room for organic growth for agencies of all sizes.

Jane Frost, CBE, chief executive, MRS

HIGHLIGHTS FROM THIS REPORT



5bn

£5.078BN
THE UK RESEARCH SUPPLY INDUSTRY GREW BY 0.7% IN 2018 VERSUS 3% THE PREVIOUS YEAR



£3.6bn

TURNOVER OF TOP 100 INDIVIDUAL AGENCIES
£3.627BN VERSUS £3.295BN THE PREVIOUS YEAR



3.9%

GROWTH YEAR-ON-YEAR FOR TOP 100 INDIVIDUAL AGENCIES



+19.5%

THE MEDIAN HOURLY PAY GAP IN FAVOUR OF MALES FOR THE COMPANIES IN OUR SECTOR WHO REPORTED IN 2019



£77

PER CAPITA UK RESEARCH SPEND PER HEAD OF THE POPULATION.
£48 (USA), £29 (FRANCE), £25 (GERMANY)



40%

OF EUROPEAN RESEARCH OUTPUT IS GENERATED IN THE UK

MRS LEAGUE TABLES ANALYSIS

David Barr, league tables compiler

In 2018, the Top 100 individual agencies generated total turnover of £3.627bn. Overall year-on-year growth within these 100 agencies was 3.9%. However, the four-year trend below shows that growth continues to depend ever more heavily upon a decreasing number of agencies. 57 agencies recorded growth, while 43 had declining turnover. The top 10 agencies accounted for 56.5% of total turnover in the Table, and the top 20 accounted for 73.3%, a continuation of further concentration of turnover at the top of the Table.

TOTAL TURNOVER AND GROWTH RATES OF TOP 100 INDIVIDUAL AGENCIES

	2015	2016	2017	2018
TOTAL TURNOVER	£2.942bn	£3.026bn	£3.295bn	£3.627bn
GROWTH RATE	6.7%	2.8%	6.5%	3.9%

NUMBER OF TOP 100 INDIVIDUAL AGENCIES WITH GROWING/DECLINING TURNOVER

	2015	2016	2017	2018
GROWING TURNOVER	72	67	64	57
DECLINING TURNOVER	28	33	36	43

The composition of the Table of the Top 100 Individual Agencies changes every year, with variable amounts of change on each occasion. Some agencies cease to qualify as their turnover declines below the threshold for eligibility, and are replaced by others whose growth has enabled them to qualify for the first time. M&A activity and brand consolidations have a major impact on the composition.

In the trend data (on the previous page), Total Turnover relates to the overall turnover of all the agencies featured in the Table in each particular year. Likewise, the Growth Rate relates to overall year-on-year growth of all the agencies within the Table in each particular year.

INTERNATIONAL CONTEXT

1. ULTIMATE OWNERSHIP

The MRS Table of the Top 50 Consolidated Businesses focuses on concentration of ownership of multiple agencies where it occurs. Ownership of these UK-based businesses (including ultimate holding companies and majority private equity) is as follows:

UK: 29 / USA: 12 / France: 2 / Belgium: 2 / Others: 5 (one each from Germany, Netherlands, Norway, Japan, Bermuda).

2. UNITED STATES

The world's largest industry is in the United States. Second largest is the UK, disproportionately so when placed in the context of the size of the US economy. The US industry is only three times larger than the UK despite GDP and population five times higher. However, the US is a major investor in the UK-based industry. In the UK the turnover level for eligibility for entry in the MRS Top 50 Table of Consolidated Businesses is comparable to that in the USA for the AMA Gold Top 50. In any mature industry there is an expectation of a high level of consolidation at the top accompanied by a long tail of much smaller businesses. Clearly the UK has a greater

number of substantial medium-sized businesses than the USA, and also a much more internationally-focused industry. Many of the leading groups in the USA (especially those which are US-owned and headquartered) serve predominantly the large domestic US market and have very low levels of non-US turnover. Not only are they minimal exporters, many have virtually no international or global capability. The UK retains its long-term status as a hub for management of international projects, and records the world's highest per-capita expenditure on market research and insight.

3. EUROPE

The UK is the largest supplier in Europe of market research and insight, representing over 40% of European output.

ELIGIBILITY AND COMPILATION METHODOLOGY

ELIGIBILITY

Eligible organisations ranked in the MRS Research & Insight Industry League Tables provide monitoring, measurement, and understanding of markets and societies in support of well-informed and evidence-based decision-making. They deploy a wide and eclectic range of personnel, techniques, technologies, methodologies, skills, experience, knowledge, and expertise. Likewise, they deliver their services via many different business models, media, and distribution channels.

The Tables seek to identify and rank the industry's largest businesses according to their UK-based turnover (including international work controlled and/or invoiced from the UK), and by their year-on-year growth (or contraction) of turnover. Growth can be organic or by acquisition, or a combination of both. Although the Tables do not differentiate these, the Notes may do so. The Notes also report any significant corporate changes which will affect future league table listings e.g. ownership, brand names. The Tables also contribute to the MRS estimates of overall industry size and growth rate.

In addition to the 100 agencies in the Table with turnover exceeding the threshold, the industry also has thousands of smaller suppliers, ranging from generalists to boutique specialists, who provide high-quality work and excellent customer service. Also, the League Tables rank turnover but do not record or rank profitability. Nonetheless, achievement of scale is a valid statement of business success, and many agencies vie each year for the recognition arising from featuring in the Table of Top 100 Individual Agencies.

TABLE OF TOP 100 INDIVIDUAL AGENCIES

This Table ranks the top 100 individual agencies by turnover. These agencies are identifiable as separate UK-based companies regardless of whether their ownership is independent or part of a larger group. Among these agencies, growth is neither universal nor evenly distributed, as is highlighted in the Table ranking the 20 fastest-growing agencies.

TABLE OF TOP 50 CONSOLIDATED BUSINESSES

This Table draws agencies (where appropriate) together under ownership groups. It further highlights the extent of industry consolidation and the concentration of turnover in the largest groups. In relevant cases the Notes accompanying the Table identify ultimate ownership as well as the named subsidiary agencies which are included in the calculation of group turnover. However, the Table ranking the 20 fastest-growing businesses within that Table shows no correlation between scale of turnover and rate of growth.

SOURCES

The Tables are compiled at the end of October using the latest data available. Many information sources are used in the compilation process. The business and trade press and related websites yield a great deal of information. Annual Reports of public companies range from the informative and transparent to the minimalist and oblique. Statutory filings at Companies House are the principal source of comparative data in the public domain but financial years and reporting dates vary. Most are December but a few are as early as February and March.

Small private companies which file abbreviated accounts at Companies House send their turnover data on request directly to the compiler. For a few companies, turnover is estimated. Estimates are in italics and tend to be cautious.

Within the Tables, previous-year turnover is amended for a few entries to replace the compiler's estimates with actual turnover subsequently reported; to include prior-year restatements by auditors; and to ensure like-for-like comparative data with the current year. However, following such amendments the previous year's entries are not re-ranked and the Tables are not re-published. Consequently, the movement in ranking for some entries in the current year may be affected. In this context, it is also worth stating that each year there are new entries into, and departures from, the Tables, so the top 100 agencies are not entirely the same agencies as in previous years. This may also distort movements in rankings.

Suggestions of eligible agencies for future inclusion are welcome. Please send an e-mail to the league tables compiler, David Barr, via industry.statistics@mrs.org.uk

MRS LEAGUE TABLES

TOP 100 INDIVIDUAL AGENCIES RANKED BY TURNOVER

2018 MRS LEAGUE TABLES, COMPILED NOVEMBER 2019

2018 RANKING NUMBER	CHANGE ON PREVIOUS RANKING	2017 RANKING NUMBER	COMPANY NAME	2018 (£M.)	2017 (£M.)	2016 (£M.)	% CHANGE ON PREVIOUS YEAR	GROWTH RANKING
1	--	--	Kantar	459.550	458.765	447.576	0.171%	56
2	▲	3	Gartner	261.124	200.379	174.966	30.315%	5
3	▼	1	Dunnhumby	249.881	253.297	254.379	-1.349%	66
4	▼	2	Wood Mackenzie	246.390	234.301	226.569	5.160%	39
5	▼	4	Ipsos MORI	200.000	193.700	177.300	3.252%	46
6	▲	7	GlobalData	157.553	118.649	100.613	32.789%	2
7	▼	6	Euromonitor	137.395	122.484	102.018	12.174%	21
8	=	8	Mintel	120.053	115.226	95.858	4.189%	42
9	--	--	CACI	110.713	99.448	93.871	11.328%	26
10	=	10	AC Nielsen	107.900	110.582	113.919	-2.425%	72
11	▼	9	GfK	98.610	105.588	103.291	-6.609%	79
12	▲	13	IQVIA Solutions	72.480	74.436	43.038	-2.628%	73
13	▼	12	Ebiquity	69.368	87.376	83.569	-20.610%	92
14	=	14	Forrester Research	64.204	64.383	38.738	-0.278%	60
15	=	15	Teradata	60.200	60.901	70.087	-1.151%	65
16	▲	21	Research Now-SSI	58.784	47.123	42.096	24.746%	9
17	=	17	Informa Telecoms & Media	55.324	58.765	60.935	-5.856%	77
18	▲	19	Information Resources	52.518	45.123	41.844	16.389%	17
19	▲	22	IDC	39.100	37.860	31.221	3.275%	45
20	--	--	WGSN	37.405	35.479	36.445	5.429%	38
21	▲	23	NatCen	33.357	33.106	29.998	0.758%	53
22	▲	24	MMR Research Worldwide	33.300	32.300	35.900	3.096%	47
23	▲	28	YouGov	31.300	27.100	24.960	15.498%	18
24	▲	27	The Research Partnership	30.670	27.517	22.579	11.458%	24
25	=	25	Hall & Partners	28.032	30.234	30.589	-7.283%	80

Those in *italics* are estimated or partially estimated figures

Those marked '--' are new entrants

MRS LEAGUE TABLES

TOP 100 INDIVIDUAL AGENCIES RANKED BY TURNOVER (CONT.)

2018 MRS LEAGUE TABLES, COMPILED NOVEMBER 2019

2018 RANKING NUMBER	CHANGE ON PREVIOUS RANKING	2017 RANKING NUMBER	COMPANY NAME	2018 (£M.)	2017 (£M.)	2016 (£M.)	% CHANGE ON PREVIOUS YEAR	GROWTH RANKING
26	▲	29	Cello Health Insight	25.245	24.734	21.817	2.066%	50
27	▲	34	Frost & Sullivan	23.500	22.106	18.468	6.306%	34
28	▲	30	Toluna	22.900	22.805	25.046	0.417%	54
29	--	--	Connexity	20.612	17.289	19.618	19.220%	16
30	▲	38	MaritzCX	20.089	16.793	16.463	19.627%	15
31	▲	33	IHS Markit Economics	19.943	18.812	14.159	6.012%	36
32	▲	39	The Gallup Organisation	18.746	15.639	13.428	19.867%	14
33	▼	31	WorldOne Research	18.255	20.563	17.940	-11.224%	85
34	▲	35	Confirmit	17.755	19.184	19.754	-7.449%	81
35	▲	71	Walnut Unlimited	17.737	22.665	26.159	-21.743%	93
36	=	36	Future Thinking	16.150	17.588	19.105	-8.176%	83
37	▲	40	Hay Group Insight	15.200	15.150	15.100	0.330%	55
38	▼	37	Kynetec	15.142	16.436	12.243	-7.873%	82
39	▲	43	C Space	15.011	13.469	12.701	11.449%	25
40	▲	41	Incite Marketing Planning	14.770	14.983	12.996	-1.422%	69
41	▲	42	Prescient Healthcare	14.423	13.574	12.716	6.255%	35
42	▲	45	Populus	13.555	13.105	12.560	3.434%	44
43	--	--	Black Swan Data	13.500	15.916	12.258	-15.180%	89
44	=	44	BVA BDRC	13.310	13.148	12.752	1.232%	51
45	▲	48	Join The Dots	12.642	12.052	9.798	4.895%	41
46	▲	51	Defaqto	12.544	11.653	11.551	7.646%	30
47	▲	59	PwC Research	12.500	10.350	8.350	20.773%	11
48	▼	47	Nielsen Book Services	12.391	12.568	13.726	-1.408%	68
49	▲	50	Firefish	12.162	11.860	10.030	2.546%	49
50	▲	80	Watermelon	12.096	16.978	16.692	-28.755%	97

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MRS LEAGUE TABLES

TOP 100 INDIVIDUAL AGENCIES RANKED BY TURNOVER (CONT.)

2018 MRS LEAGUE TABLES, COMPILED NOVEMBER 2019

2018 RANKING NUMBER	CHANGE ON PREVIOUS RANKING	2017 RANKING NUMBER	COMPANY NAME	2018 (£M.)	2017 (£M.)	2016 (£M.)	% CHANGE ON PREVIOUS YEAR	GROWTH RANKING
51	--	--	?What If!	12.002	11.900	11.525	0.857%	52
52	▲	54	B2B International	11.796	11.009	8.625	7.149%	32
53	--	--	Information Services Group	11.692	8.861	6.105	31.949%	4
54	▲	65	The Planning Shop International	11.659	9.281	12.053	25.622%	7
55	▼	32	Flamingo Research	11.426	20.397	19.033	-43.982%	100
56	▼	46	Adelphi International Research	11.301	12.878	11.098	-12.246%	87
57	▼	53	Shoppertrak	10.550	11.166	14.437	-5.517%	76
58	=	58	Basis Research	10.549	10.696	8.507	-1.374%	67
59	▲	60	MARU/edr	10.300	10.291	10.095	0.087%	57
60	▲	74	KPMG Nunwood Consulting	9.935	7.963	9.376	24.765%	8
61	▼	55	Datamonitor	9.728	10.966	10.678	-11.289%	86
62	▲	68	Harris Interactive	9.250	8.808	7.944	5.018%	40
63	▲	70	Quadrangle	9.017	8.539	9.891	5.598%	37
64	▲	79	Sparkler	8.979	7.462	5.871	20.330%	12
65	▲	72	NPD Group	8.937	8.336	7.600	7.210%	31
66	▼	26	Consulting at McCann Health	8.888	7.043	5.094	26.196%	6
67	=	67	Cello Bright Blue	8.852	8.883	9.491	-0.349%	61
68	▼	57	2CV	8.828	10.636	11.228	-16.999%	91
69	▲	90	MetrixLab	8.696	6.581	3.951	32.138%	3
70	▼	69	Strategy Analytics	8.625	8.751	9.588	-1.440%	70
71	▼	61	Nielsen Sports	8.244	8.781	9.524	-6.115%	78
72	▲	81	IFF Research	8.160	7.278	6.812	12.119%	22
73	▲	77	ABA Market Research	7.995	7.688	6.727	3.993%	43
74	▲	76	ComScore	7.763	7.846	10.532	-1.058%	64
75	▼	64	ORC International	7.726	9.965	11.689	-22.469%	94

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MRS LEAGUE TABLES

TOP 100 INDIVIDUAL AGENCIES RANKED BY TURNOVER (CONT.)

2018 MRS LEAGUE TABLES, COMPILED NOVEMBER 2019

2018 RANKING NUMBER	CHANGE ON PREVIOUS RANKING	2017 RANKING NUMBER	COMPANY NAME	2018 (£M.)	2017 (£M.)	2016 (£M.)	% CHANGE ON PREVIOUS YEAR	GROWTH RANKING
76	▼	62	Market Force Information	7.626	10.238	11.610	-25.513%	96
77	▲	89	Jigsaw Research	7.625	6.650	6.523	14.662%	20
78	--	--	MIG Global	7.552	4.110	2.292	83.747%	1
79	▲	85	BMG Research	7.547	7.001	6.742	7.799%	29
80	▲	88	Simpson Carpenter	7.355	6.730	6.120	9.287%	27
81	▼	78	Tti Global Research	7.250	7.550	7.850	-3.974%	74
82	--	--	Behavioural Insights	7.183	6.239	5.312	15.131%	19
83	▲	84	Nielsen Netratings	7.082	7.121	8.323	-0.548%	63
84	--	--	Edge By Ascential	7.013	7.813	7.031	-10.239%	84
85	▼	52	Concentra Analytics	6.922	11.638	8.452	-40.522%	99
86	=	86	Verve	6.892	6.923	6.844	-0.448%	62
87	▲	92	Northstar Research Partners	6.656	6.100	5.416	9.115%	28
88	▼	83	Pulsar	6.172	7.141	6.007	-13.570%	88
89	▲	98	Trinity McQueen	6.144	5.115	4.951	20.117%	13
90	▼	73	System1 Research	6.126	8.175	8.478	-25.064%	95
91	▼	82	Network Research & Marketing	6.001	7.153	7.234	-16.105%	90
92	▲	93	Promar International	5.899	5.900	5.363	-0.017%	58
93	▲	95	ESA Retail	5.678	5.686	5.741	-0.141%	59
94	--	--	The Nursery Research & Planning	5.643	4.627	4.916	21.958%	10
95	▼	94	Perspective Research Services	5.586	5.712	7.123	-2.206%	71
96	▲	99	Truth Consulting	5.550	5.404	5.256	2.702%	48
97	--	--	Kadence International	5.382	7.851	3.690	-31.448%	98
98	▼	96	Merkle Aquila Insight	5.355	5.657	4.153	-5.339%	75
99	▲	100	Springboard Research	5.354	5.034	4.473	6.357%	33
100	--	--	DJS Research	5.199	4.653	4.230	11.734%	23
TOTAL				3627.079	3491.768	3259.393		

Those in *italics* are estimated or partially estimated figures

Those marked '--' are new entrants

MRS LEAGUE TABLES

TOP 20 FASTEST-GROWING INDIVIDUAL AGENCIES

2018 MRS LEAGUE TABLES, COMPILED NOVEMBER 2019

2018 RANKING	GROWTH RATE	COMPANY NAME	2018 (£M.)	2017 (£M.)
1	83.747%	MIG Global	7.552	4.110
2	32.789%	GlobalData	157.553	118.649
3	32.138%	MetrixLab	8.696	6.581
4	31.949%	Information Services Group	11.692	8.861
5	30.315%	Gartner	261.124	200.379
6	26.196%	Consulting at McCann Health	8.888	7.043
7	25.622%	The Planning Shop International	11.659	9.281
8	24.765%	KPMG Nunwood Consulting	9.935	7.963
9	24.746%	Research Now-SSI	58.784	47.123
10	21.958%	The Nursery Research & Planning	5.643	4.627
11	20.773%	PwC Research	12.500	10.350
12	20.330%	Sparkler	8.979	7.462
13	20.117%	Trinity McQueen	6.144	5.115
14	19.867%	The Gallup Organisation	18.746	15.639
15	19.627%	MaritxCX	20.089	16.793
16	19.220%	Connexity	20.612	17.289
17	16.389%	Information Resources	52.518	45.123
18	15.498%	YouGov	31.300	27.100
19	15.131%	Behavioural Insights	7.183	6.239
20	14.662%	Jigsaw Research	7.625	6.650

Those in *italics* are estimated or partially estimated figures

MRS LEAGUE TABLES

TOP 50 CONSOLIDATED BUSINESSES RANKED BY TURNOVER

2018 MRS LEAGUE TABLES, COMPILED NOVEMBER 2019

2018 RANKING NUMBER	CHANGE ON PREVIOUS RANKING	2017 RANKING NUMBER	COMPANY NAME	2018 (£M.)	2017 (£M.)	2016 (£M.)	% CHANGE ON PREVIOUS YEAR	GROWTH RANKING
1	=	1	Kantar	459.550	458.765	447.576	0.171%	32
2	▲	4	Gartner	261.124	200.379	174.966	30.315%	2
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4	▼	3	Wood Mackenzie	246.390	234.301	226.569	5.160%	18
5	=	5	Ipsos MORI	200.000	193.700	177.300	3.252%	24
6	▲	8	GlobalData	157.553	118.649	100.613	32.789%	1
7	▼	6	Nielsen	139.224	142.926	153.265	-2.590%	38
8	▼	7	Euromonitor	137.395	122.484	102.018	12.174%	10
9	=	9	Mintel	120.053	115.226	95.858	4.189%	21
10	--	--	CACI	110.713	99.448	93.871	11.328%	12
11	▼	10	GfK	98.610	105.588	103.291	-6.609%	40
12	=	12	Omnicom/DAS	77.429	86.259	85.474	-10.237%	45
13	=	13	IQVIA Solutions	72.480	74.436	43.038	-2.628%	39
14	▼	11	Ebiquity	69.368	87.376	83.569	-20.610%	48
15	▼	14	Informa	65.052	69.731	71.613	-6.710%	41
16	▼	15	Forrester Research	64.204	64.383	38.738	-0.278%	33
17	▼	16	Teradata	60.200	60.901	70.087	-1.151%	34
18	▲	20	Research Now-SSI	58.784	47.123	42.096	24.746%	3
19	▼	18	Information Resources	52.518	45.123	41.844	16.389%	8
20	▼	19	MMR Group	45.300	43.400	46.300	4.378%	20
21	--	--	Ascential	44.418	43.292	43.476	2.601%	26
22	▼	17	Cello Group	43.799	44.918	42.842	-2.491%	37
23	▼	21	IDC	39.100	37.860	31.221	3.275%	23
24	▼	22	NatCen	33.357	33.106	29.998	0.758%	30
25	--	--	ITWP	32.150	31.613	34.990	1.699%	28

Those in *italics* are estimated or partially estimated figures

Those marked '--' are new entrants

MRS LEAGUE TABLES

TOP 50 CONSOLIDATED BUSINESSES RANKED BY TURNOVER (CONT.)

2018 MRS LEAGUE TABLES, COMPILED NOVEMBER 2019

2018 RANKING NUMBER	CHANGE ON PREVIOUS RANKING	2017 RANKING NUMBER	COMPANY NAME	2018 (£M.)	2017 (£M.)	2016 (£M.)	% CHANGE ON PREVIOUS YEAR	GROWTH RANKING
26	=	26	YouGov	31.300	27.100	24.960	15.498%	9
27	▼	25	The Research Partnership	30.670	27.517	22.579	11.458%	11
28	▼	24	BVA-BDRC Group	28.957	27.815	27.918	4.106%	22
29	▲	32	Frost & Sullivan	23.500	22.106	18.468	6.306%	15
30	--	--	Connexity	20.612	17.289	19.618	19.220%	7
31	▲	36	MaritxCX	20.089	16.793	16.463	19.627%	6
32	▼	31	IHS Markit Economics	19.943	18.812	14.159	6.012%	17
33	▲	38	The Gallup Organisation	18.746	15.639	13.428	19.867%	5
34	▼	29	WorldOne Research	18.255	20.563	17.940	-11.224%	46
35	▼	33	Confirmit	17.755	19.184	19.754	-7.449%	42
36	▼	28	Walnut Unlimited	17.737	22.665	26.159	-21.743%	49
37	=	37	Populus Group	17.319	16.790	15.804	3.151%	25
38	▼	34	Future Thinking	16.150	17.588	19.105	-8.176%	44
39	=	39	Hay Group Insight	15.200	15.150	15.100	0.330%	31
40	▼	35	Kynetec	15.142	16.436	12.243	-7.873%	43
41	▼	40	Incite Marketing Planning	14.770	14.983	12.996	-1.422%	36
42	▼	41	Prescient Healthcare	14.423	13.574	12.716	6.255%	16
43	--	--	Black Swan Data	13.500	15.916	12.258	-15.180%	47
44	▼	42	Join The Dots	12.642	12.052	9.798	4.895%	19
45	▼	44	Defaqto	12.544	11.653	11.551	7.646%	13
46	▲	49	PwC Research	12.500	10.350	8.350	20.773%	4
47	▼	43	Firefish	12.162	11.860	10.030	2.546%	27
48	▼	30	Watermelon	12.096	16.978	16.692	-28.755%	50
49	--	--	?What If!	12.002	11.900	11.525	0.857%	29
50	▼	47	B2B International	11.796	11.009	8.625	7.149%	14

Those in *italics* are estimated or partially estimated figures

Those marked '--' are new entrants

MRS LEAGUE TABLES

TOP 20 FASTEST-GROWING BUSINESSES

2018 MRS LEAGUE TABLES, COMPILED NOVEMBER 2019

2018 RANKING	GROWTH RATE	COMPANY NAME	2018 (£M.)	2017 (£M.)
1	32.789%	GlobalData	157.553	118.649
2	30.315%	Gartner	261.124	200.379
3	24.746%	Reseach Now-SSI	58.784	47.123
4	20.773%	PwC Research	12.500	10.350
5	19.867%	The Gallup Organisation	18.746	15.639
6	19.627%	MaritzCX	20.089	16.793
7	19.220%	Connexity	20.612	17.289
8	16.389%	Information Resources	52.518	45.123
9	15.498%	YouGov	31.300	27.100
10	12.174%	Euromonitor	137.395	122.484
11	11.458%	The Research Partnership	30.670	27.517
12	11.328%	CACI	110.713	99.448
13	7.646%	Defaqto	12.544	11.653
14	7.149%	B2B International	11.796	11.009
15	6.306%	Frost & Sullivan	23.500	22.106
16	6.255%	Prescient Healthcare	14.423	13.574
17	6.012%	IHS Markit Economics	19.943	18.812
18	5.160%	Wood Mackenzie	246.390	234.301
19	4.895%	Join The Dots	12.642	12.052
20	4.378%	MMR Group	45.300	43.400

Those in *italics* are estimated or partially estimated figures

NOTES ON LEAGUE TABLES

TOP 100 INDIVIDUAL AGENCIES

Entry 1: Kantar has become a unibrand business, reversing its previous policy of retaining the brand identities of its separate agencies. Kantar therefore now has a single entry in both the Top 100 Individual Agencies Table and the Top 50 Consolidated Ownership Table.

Entry 16: Research Now-SSI – See Note for Entry 18 within the Top 50 Consolidated Businesses.

Entry 35: Walnut Unlimited – See Note for Entry 36 within the Top 50 Consolidated Businesses.

Entry 45: Join The Dots – See Note for Entry 44 within the Top 50 Consolidated Businesses.

Entry 50: Watermelon – See Note for Entry 48 within the Top 50 Consolidated Businesses.

Entry 52: B2B International – See Note for Entry 50 within the Top 50 Consolidated Businesses.

Entry 64: In mid-2018 Sparkler became part of PA Consulting Group.

Entry 66: Consulting at McCann Health. This entry is the UK-based part of the agency which was formerly Double Helix. McCann Health is part of Interpublic Group of Companies.

Entry 69: MetrixLab is part of Macromill Group, a global online and consumer insights and analytics group headquartered in Tokyo.

Entry 73: ABA Research announced a name change in mid-2019 to KOKORO.

Entry 75: ORC International was re-named Engine Transformation in February 2019.

Entry 78: MIG Global is the insights division of Next 15 Communications plc. Formed by the merger of Morar Consulting and HPI in 2017. In 2019 Next 15 brought together all its data and insights activities under a new name – Savanta Group.

Entry 85: Concentra Analytics result reflects the opening of a subsidiary in Holland to handle some European business previously managed from the UK.

Entry 91: Network Research & Marketing was re-named This Is Motif during 2019.

Entry 94: The Nursery Research & Planning acquired Arkenford in mid-2018.

Entry 96: Truth Consulting is part of the Instinct Partners Group.

Entry 97: Kadence International is part of full-service Japanese group CMG (Cross Marketing Group).

TOP 50 CONSOLIDATED BUSINESSES

Entry 1: Entry 1: Kantar is the Data Investment Management Division of WPP plc. In mid-2019, WPP announced the sale of 60% of Kantar equity to Bain Capital, one of the largest private equity firms in the USA. The deal was completed in December 2019.

Entry 3: Dunnhumby is wholly owned by Tesco plc.

Entry 4: Wood Mackenzie is part of Verisk Analytics, a US-based energy sector data group.

Entry 5: The Ipsos MORI figure reflects the acquisition on 1st October 2018 of four divisions of GfK Custom Research – Customer Experience, Experience Innovation, Health, and Public Affairs.

Entry 7: Nielsen includes AC Nielsen, Nielsen Media Research, Nielsen Netratings, Nielsen Book Services, and Nielsen Sports. The estimated total assumes no additional turnover attributable to the acquisition from Ebiquity of its advertising intelligence business, as regulatory approval was obtained towards the end of 2018.

Entry 11: The GfK figure reflects the sale of custom research business to Ipsos MORI – see Note to Entry 5.

Entry 12: Omnicom/DAS includes Hall & Partners, Flamingo Research, C-Space, Adelphi International Research, and The Planning Shop International.

Entry 14: During 2018, Ebiquity sold to Nielsen its advertising intelligence business which accounted for about 90% of turnover in its Marketing Intelligence Division. See Note to Entry 7.

Entry 15: Informa includes Datamonitor and Informa Telecoms & Media (formerly Ovum Europe).

Entry 18: The merger of Research Now and SSI was completed at the end of 2017. The combined business continues to be privately held by Court Square Capital Partners and HGGC as majority owners. At the beginning of 2019 Research Now-SSI was renamed as DYNATA.

Entry 19: Information Resources (UK) Ltd is a wholly owned subsidiary of the company's ultimate holding company IRI Group Holdings Inc. Vestar and New Mountain Capital have joint control and equal governance of IRI.

Entry 20: MMR Group includes MMR Research Worldwide and Healthcare Research Worldwide.

Entry 21: Ascential includes WGSN and Edge by Ascential (formerly Planet Retail).

Entry 22: Cello Group includes 2CV, Cello Health Insight, and Cello Bright Blue (formerly RS Consulting) and The Value Engineers (part).

Entry 25: ITWP includes Toluna and Harris Interactive.

Entry 28: In mid-2018 BDRC Group was acquired by French research group BVA. The BDRC Group consists of BDRC Continental (now known as BVA-BDRC), ESA Retail, Perspective Research Services, Alligator Digital, and Viewpoint.

Entry 30: Connexity includes Hitwise, formerly part of Experian.

Entry 36: From 1st December 2017, Walnut Unlimited brought together under a single brand all the insight agencies of Unlimited Group (formerly Creston). These are Marketing Sciences, Walnut, ICM, and ICM Direct.

Entry 37: Populus Group includes Populus, Populus Data Solutions, and BrandCap. At the end of 2019 it acquired Decidedly (formerly FreshMinds).

Entry 41: Incite Marketing Planning is a wholly owned subsidiary of Kin and Carta plc (formerly St Ives Group plc).

Entry 44: Join The Dots was acquired during 2019 by InSites Consulting. The business will be known in the UK as Join The Dots / InSites Consulting.

Entry 48: Watermelon formerly Chime Insight & Engagement Group. Consists of Watermelon Research, Facts International, and Opinion Leader. Consolidated at the end of September 2018 into single brand of Watermelon operating within VCCP Partnership, a division of Chime Communications.

Entry 49: ?What If! The result for 2018 is for a nine-month period to 30/09/18 because of a change of financial year. In March 2019 the company was acquired by Accenture UK.

Entry 50: B2B International became part of Dentsu Aegis Network in late 2018.

TECHNOLOGY DRIVES VALUE IN 2020

Paul Twite, Managing Director Europe & MENA, ITWP



When the ultimate space cadet and entrepreneur Elon Musk, told the world that, when entering new businesses he does “zero market research whatsoever,” you know you are in interesting times.

2019 had more twists and turns than the latest Netflix blockbuster. New players invested in the industry: private investment firm Bain Capital acquiring a 60 percent share of Kantar and SAP buying Qualtrics for \$8 billion.

Toluna 

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There was also a changing of the old guard: GfK sold a chunk of its business to Ipsos and some former rivals joined forces with the merger and integration of Research Now and SSI.

SO, WHAT'S NEXT FOR THE SECTOR?

Market research industry consolidation means customers may have less choice – with fewer, bigger research platforms. By default, consumer package goods, financial, telecommunications and media & entertainment corporations may soon do all their testing – from ideation to business analysis to commercialisation – with a single research partner, leading to bigger brand and firm partnerships.

DOUBLE DOWN ON TECHNOLOGY

Technical advancements mean that research-savvy brands become less dependent on services and double down on tech with two key strands immersing:

- Automation based on best practice techniques. This will ensure maximum efficiency, enabling users to focus on interpreting what the results mean and their business implications.
- AI and machine learning will provide opportunities to mine data more efficiently and effectively as data from both primary and secondary sources grow.

THE UPSIDE OF THE GLOBAL INNOVATORS: SPEED, RIGOUR, AGILITY AND QUALITY

The benefits of doing more research with fewer partners are apparent: greater consistency across results and, possibly, less financial outlay.

Technology means clients can now have the speed, rigour and agility they require. Actions can be deployed from the results, at the pace consumers now demand.

Speed remains a constant. What was fast last year may not be in 2020 but research must also be flexible enough to fit with iterative innovation processes.

Agility means using tools and techniques which factor speed and rigour into the process, at the same time, so work of a high quality can be delivered at a faster pace.

As technology continues to evolve and standardise, a benefit of industry consolidation should be that the end data will be more actionable, faster and better quality.

THE DOWN SIDE?

Industry consolidation offers well-known challenges. Consolidated industry sectors can have relatively high barriers to entry, lack of differentiated products, and potentially few, well-established brands with high profit margins. It can also mean that larger firms end up with more business, potentially stunting creativity and competition. In the market research sector, single partner testing without the checks and balances of diverse inputs could result in worse and not better decision making.

Consolidation in the car industry has seen relatively few global manufacturers frantically buy share, interestingly it is still Mr. Musk's technology-driven Tesla which boasts a higher MarCap than competitors General Motors and Fiat Chrysler.

It's the same in the market research industry where only the truly, technology-based businesses will thrive on a global scale.

THE MEDIA ECOSYSTEM TODAY: MORE COMPLEX, MORE CHALLENGING

Christian Polman, chief strategy officer, Ebiquity



The world of media and marketing became no less complex or unpredictable during the past year. This period has been characterised by five major, interconnected themes.

1. Increased focus on evidence-based marketing
2. Strong demand for media transparency across partners and suppliers
3. Greater scrutiny of digital advertising performance and measurement
4. Heightened complexity in advertising technology and data
5. New client-agency partnership models

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Let's consider two of these themes – the first and the fourth – in a bit more detail.

INCREASED FOCUS ON EVIDENCE-BASED MARKETING

The 2018 Nielsen CMO Report found that less than a quarter of CMOs are confident they have the right ROI measurement in place. They're right to be concerned. Data from the IPA shows that, after a peak in 2012, marketing has become less effective every year since. In part, this is because marketers are focusing increasingly on short-term campaigns and short-term metrics.

The rise of short-termism has been driven in part by the allure of readily available performance metrics on many digital channels. While digital channels are often the easiest to measure, incremental digital investments don't necessarily deliver a stronger return on marketing spend as long-term brand building activity can. Because digital channels are often used in the final stages of sales conversion – combined with the fact that digital marketing metrics can be linked to sales results – many businesses have been lured into over-investing in short-term sales activation.

This is happening at a time of ever-more scrutiny of marketing spend. With closer oversight from procurement, and finance teams analysing the impact of marketing investment, like never before CMOs need clear-thinking, unbiased advice on overall marketing impact, how to optimise budgets, and the role partners play in delivering performance.

HEIGHTENED COMPLEXITY IN ADTECH AND DATA

The number of vendors and providers of advertising and marketing technology has now mushroomed from a handful to almost seven thousand. It's impossible for advertisers to keep up with all the available opportunities; that is more than a full-time job. The bewildering complexity of the adtech market makes it tempting to buy tried-and-tested, off-the-shelf products – for a demand-side platform, trading desk, or analytics suite. Yet this increases the risk of choosing solutions that aren't right for advertisers' specific needs, are too niche, or insufficiently flexible.

The volume, scale, and complexity of marketing data has grown exponentially too. This is partly a consequence of the explosion in adtech and martech platforms. Online media inventory – particularly traded programmatically – generates huge data volumes. Advertisers and their partners today face the challenge of ingesting, aligning, and harmonising online media data with other marketing and sales data sets. They must do this before they can analyse the efficiency and effectiveness of total marketing spend. The fact that different platforms produce different, often incompatible data sets only adds to the complexity.

In this environment, like never before, advertisers clearly need independent, informed, and objective guidance on the right technology and data solutions to help them deliver against business objectives.

“THE BEWILDERING COMPLEXITY OF THE ADTECH MARKET MAKES IT TEMPTING TO BUY TRIED-AND-TESTED, OFF-THE-SHELF PRODUCTS.”

VIEW FROM A RECRUITER

Andrew Goobey, director, Spalding Goobey Associates



Even though we realise the broad economic picture is hesitant for obvious reasons, we have had another busy year in a small recruitment business serving the ever changing and dynamic insights industry.

We are all in a sector focused on the changes that are coming round the corner and measuring the present to understand the future, so it's no surprise the talented business leaders and visionaries in our sector are constantly evolving their offers and using technology to be better and faster and provide their clients with the best possible insight or measurements to make evidence based decisions.



SPALDING GOOBEY ASSOCIATES

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As a result of all this disruptive progress portals, platforms and technology enabled solutions have been launched and so the need to locate the best commercial people has been on our minds a lot his year.

We have handled more business development (BD) roles than ever before and it seems the industry is becoming a bit more relaxed about research and design experience and seeing the BD professionals as being a key function for growth.

DATA...WHAT DATA?

You can't open a paper these days without people talking data as it seems the topic of our age. We have been lucky enough to work on some really exciting clientside engagements where they seek to utilise, optimise and analyse their existing data in a more proactive way. Clearly we see that as a major trend for us and a fast evolving space. There is very real interface with technology in this area, so we have seen those with less classic insight industry experience add real value and some people from within our industry retrain and repurpose their skills. Many more classic clientside insight roles are requiring an element of understanding of analysis and its associated tools.

FOR THE PEOPLE, BY THE PEOPLE

We have seen quite a lot of demand from enterprises that are publicly funded either directly or indirectly. From evaluating communication effectiveness and measuring sentiment or looking at economic impact, it's been noticeable that this area has grown. Maybe the end of austerity is igniting some of this demand? The skills required range across the piece, so qual and quant and evaluation as a distinct and separate skillset found in public and third sector environments.

THE MORE THINGS CHANGE, THE MORE THEY REMAIN THE SAME

Classic quant skills never really date and are always in fashion so it's a pillar skillset in the insights space. We are always looking for it and never tire of hearing about its application. From designing a questionnaire to presenting findings. Growing that client relationship through great work and bringing the insight story to life, our clients are always looking for that foundational research experience. Whatever the vertical, whatever the subject matter, the craft skills remain in demand.

MONKEYBRAIN

Qual remains a key area for us. Despite modernisation throughout the industry we are tasked to keep finding those skilled natural born quallies with an instinct for culture, behaviour and tuned-in, innate marketing-centric thinking. We have noticed a trend that face-to-face moderating skills are more difficult to find due to the number of researchers now conducting their qual over a platform or by moderating a community. The fundamental need for intellectually curious people remains and we find interviewing quallies from any environment stimulating and engaging. It's a great recruiter challenge looking for people able to look beyond the rational response and find the real reasons for human motivations and decoding the claimed behaviours. We are hearing some fantastic brand stories...in the strictest confidence of course.



DON'T LEAVE **YOUR NEXT** **APPOINTMENT** TO CHANCE

Recruiting for your team can be a daunting prospect when you consider the vastness of professional network sites and the blizzard of fake news available online.

Trawling the gazillion profiles on the web, you may hit upon the one that looks just the ticket but this is going to take time.

Even then you are likely to be met with either a stony silence or worse still, you go through the entire recruitment process to discover the target had no intention of moving job anyway. 80% of profiles are passive so all you end up with is a great looking long list and no next step.

But there is another way. One that doesn't rely on 'lady luck' or random good fortune. It's a way that for more than 25 years has been serving the research and insights industry successfully with vision, understanding, honesty and expertise.

A recruitment partner with integrity who specialises in your vertical and can start an informed conversation about your business needs from a position of experience in the space.

We have guided hundreds of candidates into their next career role, by listening to aspirations, understanding ambitions, evaluating skills and then steering them in the right direction.

We've supported scores of organisations to cherry-pick the next star for their team by understanding context, team dynamics, business goals and presenting qualified candidates who line up.

So don't gamble with your next appointment, contact Spalding Goobey Associates now on 020 7287 7237 or go to www.spalding-goobey.co.uk



SPALDING GOOBEY ASSOCIATES

PERSPECTIVE FROM THE FASTEST GROWERS

Jane Bainbridge, head of editorial, Research Live



While we are constantly being warned of the stagnating economic climate for British industry amid Brexit uncertainty, it is reassuring to see that there are market research agencies quite capable of growing in such challenging times.

A quick scan of the top 20 individual agencies ranked for growth shows that expansion is feasible for all sizes of business.

Top of the growth table is MIG Global – Next15's data business which includes Morar HPI, Viga, Charterhouse and Circle. By next year's report, MIG Global will be replaced by Savanta, the name change and restructure that took place at the start of 2019. But as these tables are compiled based on 2018 financial data, it is MIG Global that boasts growth of more than 83% on £7.5m turnover. The next biggest growing agency is an entirely different beast; GlobalData had a turnover of £157.5m up almost 33%. It too is the amalgamation of agencies, this time in the data and analytics arena; it was formed in 2016.

In third place is MetrixLab, which also featured in last year's fastest growing agencies, and has achieved growth of more than 32%. Angela Morgans, the company's regional managing director, Europe, said a combination of factors was behind its strong performance. "We have a strong team across all levels which inspires clients and creates strong partnerships, but we also focus and invest in innovation, AI and technology to keep us ahead of the wider market.

"WE HAVE THE SCALE OF A LARGE MARKET RESEARCH AGENCY, BUT THE CULTURE AND WAY OF WORKING, MORE IN LINE WITH A START-UP."

"Finally, we offer something quite unique; we have the scale of a large market research agency, but the culture and way of working, more in line with a start-up," she says.

In the UK, MetrixLab's growth has been organic although internationally it, and its owner Macromill, has made acquisitions. The organic growth has come from a mixture of new clients and extending work with existing clients.

"Strategically we want to stay focused where we are most experienced, and can offer the most competitive difference, but we do go into new vertical markets in response to client needs. Recently, we have been moving more into the film and entertainment, retail and financial verticals," adds Morgans.

The Nursery Research & Planning is a new entrant to the growth tables. In July 2018 it bought market research agency Arkenford. Peter Dann, co-founder of The Nursery, says the purchase added "expertise in customer experience, market sizing and data analytics".

But overall, he says recommendations are vital for growth. "Our primary focus should always be doing great work for our clients; generating new business is essential but must never detract from work of the highest quality. Word of mouth is still the single biggest source of business development – both within existing client organisations and being recommended to new ones."

**“NEVER UNDERESTIMATE THE
ROLE CREATIVE DELIVERY
PLAYS IN SUPPORTING INSIGHT
ACTIVATION CLIENT-SIDE.”**

With Arkenford on board – and now fully merged into the business – it has allowed The Nursery to offer more advanced data analytics and develop new tools.

Extending expertise into this area is a common aim among market research agencies as they adapt to current business requirements. But it is not the only area agencies are looking to expand into.

At Trinity McQueen, its joint managing director, Robin Horsfield, says acquisition has allowed it to extend into healthcare, product placement and product testing – all areas “often asked for by our clients”.

But as a business that has consistently grown, Horsfield says it’s because of a clear focus on organic growth: “Since the business was started in 2013, we’ve grown every year. Acquisitions form part of our corporate strategy to accelerate growth into services, sectors and markets which have a considerable cost of entry. We’ve done this recently with Allto Market Research.”

Specifically on its growth he says: “Firstly, we’ve developed a clear behavioural science proposition, which our clients (new and existing) are finding very attractive. We use a practical approach looking at how hardwired human instincts impact on the choices people make. Consultancy, some great technology and good people has been a winning formula.

“We have invested in training, development and technology to ensure our people have the right level of skills, knowledge and resources to do great work. And finally, never underestimate the role creative delivery plays in supporting insight activation client-side,” says Horsfield.

Jigsaw grew 14.6% and its managing director, Sue van Meeteren, says it has developed a new communities offer using its own tech platform that links with WhatsApp. “We are running long- and short-term communities for several clients using this new technology. We’re the first company to fuse WhatsApp with a back-end research platform, so we’re very excited about the opportunities this offers to our clients.”

Sparkler, now part of PA Consulting, has expanded by “enhancing and enriching” current client relationships, according to its managing director and chief strategic officer, Jamie Allsopp.

“This client orientation evolved our position towards ‘digital consumer experts’, which proved an excellent focus and attracted new clients. It set the agenda for developing service innovation and our panels and communities services. It also helped us understand ‘what we’re not’, which stopped us getting distracted,” he says.

Expanding expertise as an agency invariably also involves hiring people to fill the gaps. So, has Allsopp had to do that?

“Absolutely – not just in terms of numbers but skills too, because client problems are trickier than ever to answer, requiring a cross-section of expertise areas. Beyond the skills we have brought in-house, we’ve also built stronger relationships with individuals and organisations that we can work alongside to help meet clients’ needs. This broadening of capabilities was one of the reasons we sold to PA Consulting,” he says.

IMPACT OF BREXIT

When talking about the broader economic climate within which these agencies are operating, it’s impossible not to bring up Brexit. Van Meeteren says she noticed clients were reluctant to commit to budgets and projects in the immediate aftermath of the EU referendum in 2016 but since then, business has been good. “Clients needed and wanted to take a ‘let’s get on with it’ approach,” she says.

While Allsopp, Horsfield and Morgans all say Brexit has had little discernible impact on business, The Nursery’s Dann is less bullish.

“In our opinion, the impasse itself is mainly responsible for the stagnation in the economy and particularly in the marketing communications sector that accounts for a large proportion of our business. It’s making growth harder than ever, although even more rewarding when we achieve it.

“But this is as nothing compared to the long-term impact that we believe Brexit will have on the UK economy and specifically on the global market research business for which we have been seen as world leaders for so long,” he says.

Whatever form Brexit takes, we don’t know how the longer-term economic climate will fare, but there aren’t many suggesting it’s all going to be rosy, with many economists foreseeing a recession. So how do these well-performing agencies respond?

“I tend to take the – perhaps naïve – view that challenging economic times can be good news for strategic insight companies, insofar as clients need to understand customers better than ever to stay ahead in turbulent times. Focusing on clients’ areas of interest is clearly a priority. Our digital expertise seems to have worked in our favour,” says Allsopp.

Van Meeteren is similarly optimistic. “We have built a diverse sector and client base (including several outside the UK), a very strong team and we put a lot of emphasis on innovation and R&D – these have helped us through past economic downturns and we are confident they will stand us in good stead again.”

Trinity McQueen’s Horsfield adds: “Conditions are pretty benign at present, but the research market is huge. There’s plenty to go around. We’ve had a good five years and we’re optimistic about the future. We respond by focusing on the things we can control.”

Again, Dann is slightly more cautious: “Market research agencies have very limited ability to create new business streams or even proactively manage their own development as we are so dependent on the businesses we advise. We have to work harder to win a greater share of a decreasing pot of available business; we’re constantly sharpening up our new business processes and looking to expand the breadth of our offer.”

He thinks future growth is going to be “very hard for the foreseeable future”. “We intend to grow as a business, but it will be the definitive uphill struggle to battle external trends. We hope that as our clients’ businesses also come under increased pressure, they will place even more value on impartial, informed, constructive advice delivered with clarity and insight,” says Dann.

LOOKING AHEAD

In this context, can the insight industry flourish in 2020? “It will where and when creativity, thinking, analysis and interpretation are strong. Tools and automation can help but the key will still be the brains asking the questions, interpreting the data and providing the answers for clients,” says Jigsaw’s van Meeteren.

Allsopp has seen a trend toward taking things in-house. “Traditional approaches are on the wane, regulation is becoming a real burden. But if agencies can reconsider what it means to truly represent the benefit of involving people in the context of their client’s issues, there should be all to play for. For us, key spaces for this include panels and communities, service innovation and visual outputs from our studio.” Horsfield expects the data collection side of market research to continue to grow but also places a strong emphasis the meaning and interpretation around that.

MetrixLab’s Morgans doesn’t think the market research industry actually changes much from year to year. “Yes, there are some new, important and growing trends, like AI and DIY, but I don’t think they will have a much bigger impact next year versus this year.

“The industry will flourish in the same places it does this year; when research agencies do great work; when clients get more than they asked for or imagined; when research can be elevated and make a real impact on a client’s business decisions and success. Research at its best can be inspiring, transformational and game changing.”

**“CONDITIONS ARE PRETTY BENIGN
AT PRESENT, BUT THE RESEARCH
MARKET IS HUGE. THERE’S PLENTY
TO GO AROUND.”**

THE CLIENT PERSPECTIVE

Jane Bainbridge, head of editorial, Research Live

We've seen how market research agencies are faring and talked to those that are performing well, in often challenging conditions. But as The Nursery's Peter Dann says in the agency perspective piece, agencies are "dependent on the businesses we advise". So how do those businesses view the state of market research? What do those buying the services think agencies need to do going forward to survive and thrive?

Centrica's director of customer insight and marketing effectiveness, Stuart McDonald, says: "I know each agency wants to be a key strategic partner to a client, and I believe the best work happens when that's the case. The agency that looks at the bigger picture, and acts as a true consultancy service, will be the agency best placed to succeed."

Beyond the long-term strategic partners that large brands inevitably work with, there is a desire to innovate. Georgina White, group insight director at BT, says: "We like trying new methodologies and building new capabilities, so we have a strong approach to 'test and learn'."

Of BT's existing partners, she looks for a mix of skills and likes them to "challenge us to be our best every day".

Jenny Syddall, global insights and analytics director at Carlsberg, says it's all about offering tools that make her job more efficient. "Be relevant. Listen to what our challenges actually are. And focus as much on helping to embed and action learnings as designing the research solution itself."

Over the past year, Google has been mixing third-party data with its own behavioural data to show what people are doing, and why they are doing it. Its head of measurement and analytics, Harry Davies, says internally it has been focusing on consultancy skills such as problem definition and solving, and harder quantitative skills. But from agencies he is looking for "more ethnographic research methods, and advanced methods to look at problems where claimed behaviour doesn't work".

Behavioural data has also been a focus at The Football Association. Ross Antrobus, head of behavioural insight and business analytics, says what has worked well at the sports organisation this year has been improved weaving of big data with both survey and behavioural data, as well as applied machine learning principles to data sets to help identify behaviour changes linked to known customer drop off areas.

Next year, he will be looking for “further growth in our storytelling and data visualisation abilities” – buying in more ROI modelling and behaviour change expertise. “We don’t really shop by method, just look for good agencies who can deliver projects on brief, on time and on budget,” he adds.

At another sporting organisation – Formula One – Matt Roberts, director of research and analytics, is seeing a shift in the methods being employed by F1.

“Traditionally 85% of what we have done in the past has been market research (and mostly survey) based with only 15% focused on analytics. I would say that in 2020 this will move to 60/40 as analytics, in combination with market research, is really cutting through internally, and enabling us to provide ‘actual data’ on top of the ‘claimed data’ previously provided.

“WE DON’T REALLY SHOP BY METHOD, JUST LOOK FOR GOOD AGENCIES WHO CAN DELIVER PROJECTS ON BRIEF, ON TIME AND ON BUDGET.”

“Since 2017, we have built up a database of over four million fans which has given us a greater understanding of our fans’ behaviour, and we are using this data to build retention and acquisition models around our commercial products. Our investment in analytics in 2020 will double as there is a lot of insight to glean from this previously untapped area,” he adds.

While Roberts will continue to buy in neuroscience, galvanic skin response research and eye tracking, other areas may not be good news for traditional research agencies.

“We are buying a lot more research direct from panel providers – this allows us to carry out cost effective research and answer specific business questions without the full analysis and PowerPoint presentations, which are becoming more redundant in an age where stakeholders have less time and who are often happy with a few bullet points rather than a full-blown presentation.”

“THE AGENCY THAT LOOKS AT THE BIGGER PICTURE, AND ACTS AS A TRUE CONSULTANCY SERVICE, WILL BE THE AGENCY BEST PLACED TO SUCCEED.”

LOOKING FORWARD TO 2020

In 2020, what can agencies do to be better noticed by clients? For Jaguar Land Rover's global customer insights director, Joanne Pearson, it's simple: "Offer something different – showcase examples; use technology to reduce costs and time and add value."

BT's White advises agencies to think more like consultancies. "Be comfortable with different types of data, thinking outside the specific brief when making recommendations and helping influence beyond a core deliverable. Have a clear USP."

Telefonica's head of insight, Claire Rainey, suggests moving away from a sales model. "There is no point speaking with a sales manager if they are not going to be running the work and not close enough to the technical capability."

For agencies to be ready to adapt to the shifting requirements of those buying research, they need to understand the changing role and influence of insight within the organisation. Inevitably there's a pressure on marketing budgets but that can work to the advantage of insight. "Our role is more important than ever to ensure marketing spend is optimised. We must link closely with business analytics to measure performance and commercially driven decisions," says Rainey.

"We are being pushed to use higher quality evidence to make decisions," adds Google's Davies. "This is leading to using scientific method and testing hypotheses with experimentation. As researchers, we are confident in working this way, so are being called on to answer wider business questions than we have been in the past. This has also led to us needing to be far more commercial in how we present our findings, particularly giving predictions of the business value created by our insights."

"OUR ROLE IS MORE IMPORTANT THAN EVER TO ENSURE MARKETING SPEND IS OPTIMISED. WE MUST LINK CLOSELY WITH BUSINESS ANALYTICS TO MEASURE PERFORMANCE AND COMMERCIALY DRIVEN DECISIONS."

“AS CONCERN GROWS BUSINESSES ARE LIKELY TO WANT TO REDUCE RISK IN THEIR INVESTMENTS; THIS WILL LEAD TO NEEDING HIGHER QUALITY EVIDENCE.”

Carlsberg's Syddall says: “The onus is on us to show ‘observable difference’ in how we engage the business. Much of that comes from proactive sharing of knowledge and building effective, simple basics around consumer truths, shopper experiences and key performance metrics.” For some organisations, the changing role and influence of insight is very specific to their business. For example at BT, White says it is part way through a multi-year insight transformation and needs to “continue to deliver a strong insight capability that ensures customer insight is understood – to the right depth of understanding, at the right time, in the hands of the decision-maker and influencers”.

How will broader macroeconomics affect business conditions next year? For Syddall, it's all about flexibility in the face of unpredictability. “We increasingly see that the unexpected becomes our new reality, so we need to be agile enough to respond to this and help our business partners to correct course as needed.”

“On the Brexit front, as a Brit living in Copenhagen it has a very personal relevance for me. I live in hope that our collective common sense will kick in, but let's see how that one pans out,” she adds.

Google's Davies thinks businesses will become more risk-averse. “As concern grows businesses are likely to want to reduce risk in their investments; this will lead to needing higher quality evidence. There's uncertainty around how businesses will operate post-Brexit – and how other areas of the business (that are not directly impacted by the uncertainty) can fill the gap,” he says.

Cost pressures will continue, as in 2019, says Centrica's McDonald, adding: “But that needs to be balanced with a realisation that the customer voice needs to be heard and acted upon. How we collect data to inform proposition design, pricing and marketing will become even more important than it is now.”

HIGHLIGHTS FROM THE MRS INDUSTRY SURVEY 2018

David Cahn, principal at synygis consulting



The UK research supply industry grew by 0.7% in 2018 to £5.078billion.

Our industry is the second largest in the world, topped only by the USA; and continues to dominate in terms of research spend per head of population: £77 per capita in 2018, with the USA trailing at £48, and France and Germany at £29 and £25 respectively.

There are more than 3,500 active registered businesses in the UK listing market research as their primary activity, and a further c.2,500 listing market research as a secondary activity.

MRS carries out an Annual Survey among its full-service Company Partners to monitor some of the underlying business parameters of the UK research supply side with particular reference to the core suppliers' c.60% of the market, and to help provide internationally comparable top-line information for use by ESOMAR and others in tracking global research trends.

The 2018 survey was published to participants in August 2019.

BUSINESS EXPECTATIONS

Companies in the UK were less upbeat about the prospects for their own company in the year ahead than elsewhere in Europe (as measured by EFAMRO's MoodIndicator). On the other hand, UK sentiment regarding the industry as a whole indicated greater optimism than elsewhere in Europe – nearly one third in the UK compared with one fifth in Europe expected the industry to grow over the coming year.

ONLINE DATA COLLECTION

Online data collection accounted for 60% of quantitative research spend in 2018, growing from just 44% of spend over five years. The traditional methodologies have all suffered: face-to-face fieldwork shrank from 14% to 12% of quantitative spend over five years, telephone fieldwork declined from 14% to 6% of quantitative spend over the same period, and postal from 7% to just 3%. Well over half of online surveys are now optimised for completion by most devices, whether desktop, laptop, tablet or mobile.

CLIENT SECTORS

The principal client sector categories were:

- the consumer sector, attracting just under one third of total spend.
- the government / public services sector, with a little over 10% of spend.
- Financial services and media, each taking just under a tenth of spend.

These sector proportions have been stable, both short-term year on year, and also over the longer term.

Allowing for definitional differences, this puts the UK spend higher than the ESOMAR GMR average for Consumer (24%), Public Sector (8%) and IT (5%), but much lower than the rest of the world for Media and Pharmaceuticals (both 16%).
International Project Management

Projects with data collection in one or more overseas countries but controlled and invoiced from the UK have long been a particular strength of UK suppliers, and represented 39% of UK research revenues in 2018. (The corresponding ESOMAR GMR proportion was 26%.)

MRS ANNUAL SURVEY 2019

Invitations to take part in this year's Annual Survey will be sent out in February/ March 2020. Please make every effort to respond in full so that we can provide an accurate reflection of the sector.

THE GENDER PAY GAP IN THE MARKET RESEARCH SECTOR

David Cahn, principal of synygis consulting

The UK's research industry has a gender pay gap which closely reflects the national pay gap. Also, research companies employ a higher proportion of females than UK companies in general.

Among UK research companies, the gender pay gap sits at 19.5% in favour of males and has marginally widened year on year by 0.6%.¹

Across all 26 million UK jobs, the gender pay gap is 17.3% in favour of males and slightly shrank year on year by 0.5%.² For all jobs in the private sector overall, the gap is 23.6%, shrinking 0.2% year on year.

“ACROSS ALL 26 MILLION UK JOBS, THE GENDER PAY GAP IS 17.3% IN FAVOUR OF MALES.”

The Gender Pay Gap is the difference between average male and average female pay in an organisation.³ The gender pay gap is not the same as unequal pay, which is paying men and women differently for performing the same (or similar) work. Unequal pay has been unlawful since 1970.

In April 2018, larger companies (those with more than 250 employees) were required for the first time to publish their gender pay gap. The annual follow-up reporting in April 2019 drew responses from 10,646 larger companies nationwide, including 30 research organisations.⁴ Estimates of the gender pay gap across all UK jobs, irrespective of organisation size, were updated in October 2019 with the release of data from the latest Annual Survey of Hours and Earnings (ASHE).⁵

The ASHE data show that the gender pay gap is strongly age-related. Among under 40-year olds, the gender pay gap is now close to zero (for full-time employees), and among 40 to 49-year-olds the gap has decreased substantially over time. But among those over 50 years, the gender pay gap is not declining.⁶

The implications for researchers are clear. Narrowing the gender pay gap is a long-term project and will take time. More female-oriented recruitment and training will play their part – but the benefits inevitably will be slow to percolate through to all strata of the sector. Meanwhile, the under-representation of women at senior levels continues to be the major driver of a gender pay gap in many companies.

- The turnover-weighted median hourly pay gap⁷ among research companies (+19.5% in favour of males) was much the same as both the ASHE median hourly pay gap (+17.3%) and the ASHE median hourly pay gap for the private sector (+23.6%).⁸
- 4 research companies reported an hourly pay gap in favour of females – NatCen (-18.0%), FIL (-9.8%), and the two Kantar units Precise Media (-4.0%), and Kantar Media (-0.4%). For 23 companies the hourly pay gap favoured males, while 3 claimed hourly pay parity.

This might seem a disappointing outcome, but is actually little different to the proportions for all companies nationwide – 12% with a gap in favour of females, but 78% with a gap in favour of males.⁹

- The turnover-weighted median gap for bonus pay among research companies was even less female-friendly (+30.7% in favour of males). Only 2 companies returned a bonus pay gap in favour of females, – Precise Media (-403.1%) and Perspective (-2.3%). The male-oriented bonus gaps ranged from +6.1% (Walnut) to +89.0% (Merkle).

On the other hand, the percentage being awarded a bonus at all was balanced much more evenly by gender. Among females, 51.6% were in receipt of a bonus (males, 52.6%), and 15 of the 30 research organisations awarded a bonus to as many, or more, of their females as their males.

- Research companies employ a higher proportion of females than companies in general overall, both in total (49.3% vs.47.2%), and also within every pay quartile. Even for the top pay quartile, this difference, while marginal, is still evident (40.4% vs.39.7%).

RESEARCH COMPANIES EMPLOY A HIGHER PROPORTION OF FEMALES THAN COMPANIES IN GENERAL OVERALL.”

THE GENDER PAY GAP IN THE MARKET RESEARCH SECTOR

INDIVIDUAL CALCULATIONS FROM THE 30 RESEARCH COMPANY RETURNS ARE SHOWN BELOW.

GENDER PAY GAP 'SNAPSHOT DAY' 5 APRIL 2018											
	GPG MEDIAN HOURLY %	GPG MEDIAN HOURLY % 2018 VS 2017 ^{1,4}	GPG MEDIAN BONUS %	MALES IN RECEIPT OF BONUS	FEMALES IN RECEIPT OF BONUS	FEMALE LOWER QUARTILE	FEMALE LOWER MIDDLE QUARTILE	FEMALE UPPER MIDDLE QUARTILE	FEMALE TOP QUARTILE	TOP QUARTILE FEMALES 2018 VS 2017 ⁴	TOTAL
ASHE 2018 – total (n = 180,000) ¹	17.3%	-0.5%									
ASHE 2018 – private sector	23.6%	-0.2%									
UNWEIGHTED MEAN/MEDIAN ACROSS ALL RETURNERS (n=10,646)	9.5%	0.2%	15.7%	35.8%	34.5%	53.8%	49.8%	45.6%	39.7%	1%	47.2%
UNWEIGHTED MEAN/MEDIAN across MR organisations (n=30)	14.7%	0.7%	24.4%	52.6%	51.6%	55.0%	52.2%	49.5%	40.4%	1.2%	49.3%
WEIGHTED MEDIAN across MR organisations ²	19.5%	0.6%	30.7%								
National Centre For Social Research	-18.0%	-3.0%	31.0%	18.0%	23.0%	53%	60%	77%	73%	-2.0%	66%
FIL Market Research	-9.8%	2.8%	37.5%	13.2%	15.9%	63%	77%	91%	79%	5.0%	78%
Precise Media Monitoring (now part of Kantar Media)	-4.0%	-6.1%	-403.1%	52.5%	51.0%	38%	31%	43%	36%	-2.0%	37%
Kantar Media UK	-0.4%	12.3%	20.5%	36.7%	37.2%	35%	24%	31%	31%	-2.0%	30%
Perspective Research Services	0.0%	-0.3%	-2.3%	18.0%	18.6%	52%	51%	68%	48%	-6.5%	55%
Sensory Dimensions	0.0%	0.0%	n/a	0.0%	0.0%	68%	71%	78%	76%	-15.0%	73%
The Oxford Market Research Agency	0.0%	0.0%	100.0%	5.0%	0.0%	89%	92%	82%	75%	-13.3%	85%
MaritzCX	0.6%	-12.9%	73.3%	6.7%	11.6%	40%	51%	41%	49%	0.0%	45%
AC Nielsen	2.9%	-3.3%	26.4%	57.0%	54.0%	51%	54%	53%	43%	1.0%	50%
Ipsos MORI UK	4.6%	5.5%	31.3%	49.2%	51.9%	45%	65%	59%	47%	3.5%	54%
Euromonitor International	6.6%	-15.0%	42.0%	78.0%	78.0%	56%	51%	55%	42%	1.0%	51%
IFF Research	7.4%	7.4%	20.3%	45.7%	54.3%	57%	47%	48%	50%	1.0%	50%
Merkle UK Three	13.0%	n/a	89.0%	7.0%	3.0%	57%	51%	55%	41%	n/a	51%
Informa (Business Intelligence Division)	16.0%	4.2%	30.6%	85.0%	85.2%	44%	43%	32%	24%	1.0%	36%
Dunnhumby	18.1%	-1.8%	20.2%	66.0%	61.6%	57%	52%	36%	26%	1.8%	43%
GlobalData	18.5%	3.7%	57.7%	57.1%	43.3%	53%	32%	37%	20%	-0.6%	35%
Kantar UK	18.7%	1.8%	42.1%	51.8%	45.5%	58%	60%	51%	42%	3.0%	53%
Mintel Group	19.1%	6.7%	7.1%	64.7%	65.3%	54%	62%	45%	36%	-1.5%	49%
Young & Rubicam	22.6%	-6.1%	40.0%	72.0%	66.0%	60%	41%	45%	24%	2.0%	43%
IQVIA UK	23.4%	1.2%	43.6%	84.8%	87.0%	71%	65%	60%	43%	1.5%	60%
Wood Mackenzie	24.4%	-1.4%	44.9%	88.1%	86.5%	47%	44%	33%	23%	4.0%	37%
Experian	24.8%	0.2%	42.1%	85.1%	85.7%	49%	40%	32%	24%	0.1%	36%
IHS Markit	25.1%	-1.5%	46.7%	91.0%	92.0%	51%	34%	28%	23%	1.0%	34%
CACI	27.9%	1.4%	10.0%	39.6%	44.3%	41%	31%	15%	19%	1.0%	27%
Ebiquity Associates	28.0%	-6.0%	52.0%	53.0%	47.0%	64%	58%	55%	57%	26.0%	59%
Teradata (UK)	30.2%	2.1%	38.1%	93.6%	89.7%	34%	18%	11%	15%	5.0%	20%
Gartner (incl CEB)	31.7%	-0.1%	72.4%	96.0%	95.0%	60%	46%	42%	21%	1.0%	42%
Walnut Unlimited	33.7%	13.7%	6.1%	7.0%	3.0%	74%	100%	89%	59%	-14.6%	81%
Information Resources (UK)	37.5%	-1.6%	36.8%	69.7%	67.6%	69%	59%	49%	39%	1.6%	54%
GfK UK	37.9%	15.9%	50.7%	85.6%	85.5%	65%	57%	43%	26%	-2.9%	48%

¹ see Notes for ASHE methodology

² turnover-weighted (using this as an approximation to relative staff numbers)

³ - = female gap improved / + = female gap worsened

⁴ this column compares the 29 companies who reported for both 2018 and 2017. Merkle reported for 2018 only.

Notwithstanding the extended timescale associated with gender pay gap reduction, comparison of the 2018 and 2017 figures offers interesting pointers. In fact, several research companies have published the two years' data side by side to help assess any progress.¹⁰

- For 2018 vs.2017, the research companies' gender pay gap has marginally widened by 0.6%.

13 research companies improved female pay year on year by shrinking the pay gap in favour of males, while 14 oversaw a deterioration in female pay by expanding the pay gap in favour of males. This is much the same as the outcome for UK companies in general, where just under half (48%) managed to shrink their pay gap.¹¹

- It was encouraging that year on year, the proportion of females in the top pay quartile did grow slightly, by +1.2%. 18 research companies managed to increase the proportion of females in the top pay quartile, half as much again as the minority (11), where female presence in the top pay quartile did not grow.

Showing the gender split within pay quartile is part of the mandatory requirement: but companies who go further to present the gender pay gap within each quartile¹² demonstrate vividly the impact of female under-representation in the top quartile.¹³

GENDER PAY GAP BY PAY QUARTILE	LOWER	LOWER MIDDLE	UPPER MIDDLE	UPPER	TOTAL
INFORMA (WHOLE COMPANY)	-1.0%	0.0%	1.0%	9.0%	21.5%
IQVIA	-0.5%	1.0%	4.8%	6.8%	23.4%
NATCEN	0.0%	0.0%	-4.0%	28.0%	-18.0%

In the wake of the October 2019 updated ASHE gender pay gap stats, there have been renewed calls to impose penalties on companies who are not compliant with the official requirement to publish their pay gap data. There have even been recommendations to extend the net to cover smaller companies, right down to perhaps 30 employees.¹⁴ In the meantime, the research community has embraced gender pay gap analysis and not merely because it is now mandatory. There is wide agreement that reducing the gap between male and female pay is both morally and socially desirable, but also that there is a strong business case for doing so, as the upside of an improved employment offer to half the workforce. “Addressing this disparity is beneficial to women and society as a whole. It also makes compelling business sense” (Gartner).

THE GENDER PAY GAP IN THE MARKET RESEARCH SECTOR: NOTES

- 1 The 0.6% widening is among those 29 research companies who published gender pay gap information for both 2017 and 2018. Comparing companies listed in 2017 to 2018 there are two new entries and four companies from 2017 which did not report in 2018.
- 2 ASHE 2018 provisional figures were published in October 2019, at which time the 2017 figures were revised: the headline median gap for all UK jobs was revised from 18.4% to 17.8%. The gap between the research industry's 19.5% and the national 17.3% is too close to call because of the different calculations used for each.
- 3 The gender pay gap is calculated as the difference between average earnings (excluding overtime) of men and women as a proportion of average earnings (excluding overtime) of men. The two most commonly discussed gaps are for average hourly earnings and for bonus pay.

For example, a +10% gender pay gap in hourly pay denotes that women earn 10% less, on average, than men.

Conversely, a -10% gender pay gap in hourly pay denotes that women earn 10% more, on average, than men.

There are at least two ways to calculate average earnings – the mean average and the median average (the mid-point when individual earnings are ranked by value). The Office for National Statistics (ONS) recommends the median for average earnings as it is less affected by the potentially disproportionate impact of very high earners.
- 4 Details of the 10,646 companies making a gender pay gap return are available at: <https://gender-pay-gap.service.gov.uk/>. The 30 research companies who made a return were identified by reference to the MRS League Tables, supplemented by any other companies who made a return, and were MRS Company Partners or organisations employing MRS members who self-identified under SIC code 7320.
- 5 ASHE provides the reference source for the gender pay gap across all UK employers, irrespective of size. ASHE is based on a 1% random sample of the c.26 million employee jobs registered to PAYE schemes, with 180,000 responses analysed.
- 6 Office for National Statistics website <https://tinyurl.com/y4mtxs6s>
- 7 Weighting by turnover is an approximation for payroll size, to help make comparison with ASHE more feasible.
- 8 ASHE does offer gender pay data within SIC code, but the analysis base for SIC 7320 (market research and opinion polling) is proving too small to be reliable – less than 300 full-time jobs (+30 hours per week), and less than 100 part-time jobs. Also, only 14 of the 30 research organisations discussed above self-classify under 7320, and these 14 represent just 33% of the total when weighted by turnover.
- 9 <https://www.bbc.co.uk/news/business-47822291> (5 April 2019)
- 10 Year-year analysis is among improvements to gender pay gap analysis recommended by the Royal Statistical Society: <http://tiny.cc/iw5sfz>
- 11 From the BBC article referenced above at note 9.
- 12 Presenting the pay gap within pay quartile is another recommendation by the Royal Statistical Society.
- 13 The analysis by quartile would be somewhat equivalent to the ASHE age analysis if we assume that age and seniority tend to be correlated.
- 14 For example: "To tackle the pay gap comprehensively there is a strong case for extending the pay reporting regime to smaller companies – say, those with 30 or more staff." (Andy Haldane, Bank of England Chief Economist, reported in The Guardian 21 October 2019).

THE GENDER PAY GAP IN THE MARKET RESEARCH SECTOR: THE CEO PLEDGE

Vanella Jackson, Global CEO, Hall & Partners



Working as part of a wider industry that specialises in understanding people, I was extremely proud to join forces with some of the biggest names in market research to help create something truly tangible. A call-to-action to signal that, as an industry, diversity and inclusion really matters, and that we should all be doing more.

It's time we celebrated difference and made a public commitment to drive positive change. I like to think the amazing strides we're making in the world of market research can ripple out into other sectors, as we grow as a force of change.

At Omnicom and Hall & Partners, we have always been proud to have an inclusive, supportive culture – one that embraces the breadth and richness that comes from having a wide range of diverse people, helping us to represent and de-code the world we live in.

I really feel like we're only just getting started with MRS's 'CEO Pledge' and I call upon everyone in the sector – no matter your role, or title – to help us make this an industry standard, changing the sector for the better.

The pledge has been signed by the following:

Big Sofa: *Kirsty Fuller*
C Space: *Felix Koch*
Dynata: *Gary Laben*
GfK: *Warren Saunders*
Hall & Partners: *Vanella Jackson*
Ipsos MORI: *Ben Page*
ITWP (parent company of Toluna & Harris Interactive): *Paul Twite/Frederic Charles*
Kantar: *Eric Salama/Amy Cashman*
Kantar Profiles Network: *Caroline Frankum*
NatCen: *Guy Goodwin*
Northstar: *Matthew Sell*
Opinium: *James Endersby*
Quadrangle: *Ali Camps*
Savanta Americas: *Vin DeRobertis*
Savanta Global: *Roger Perowne*
Savanta UK: *Nick Baker*
Watermelon: *Mark Squires*
Zappistore: *Steve Phillips*

To find out more about the pledge visit mrs.org.uk/inclusion

CHALLENGE YOUR TRADITIONS

Interview with the award-winning agency, Differentology



How does an agency provide bespoke and innovative solutions and remain competitive? Research Live talked to Mark James, CEO of Differentology, winner of the award for ‘Breakthrough Business of the Year’ at the MRS Awards 2019.

CAN YOU IDENTIFY A LEADING FACTOR TO WHICH YOU ATTRIBUTE YOUR IMPRESSIVE GROWTH?

We describe Differentology as a new breed agency, working at the intersection of data, human behaviour, technology and creative storytelling. When you merge all of those different skillsets into one agency, we think we’ve created something really unique in the research sector. Having a mindset to challenge the ways things have traditionally been done is something we’re passionate about, and we’re fortunate enough to work with clients who champion the same belief.

HOW CAN YOU SUSTAIN YOUR FOCUS ON BESPOKE CONSULTANCY WHEN FACED WITH CLIENTS WANTING FASTER, CHEAPER RESULTS?

We pride ourselves on being a research consultancy, but from day one we’ve always baked in the idea of being agile and cost effective. I remember seeing a post on social media about how a company offers 3 services, good-cheap-fast, but that you could only choose 2 of them. If you have a challenging mindset you’d ask straight away, why can’t I have all 3? So we solved that problem (I’m not going to tell you how!), it gave us a point of difference, and our clients appreciate it.

WHAT SKILLS ARE YOU PARTICULARLY FOCUSING ON DEVELOPING OR RECRUITING IN THE NEXT 12 MONTHS?

We've always had a core of project managers, research experts and data analysts... but we've also always supplemented those skillsets with savvy tech experts, and cool creatives. We like to bring these unique skillsets together to provoke our thinking and diffuse it through our innovation, and ultimately to our clients. We attract talent that challenge and push us constantly. We know that to grow you need to change and innovate, and we're looking for people who have that in their makeup. (If that sounds like you – give us a shout!).

WITH RAPID INCREASE IN HEADCOUNT HOW ARE YOU MAINTAINING THE COMPANY CULTURE THAT YOU TAKE SUCH PRIDE IN?

Our culture is massively important to us. Our people help to drive the business forward. No matter who you are, where you've come from or what your experience is, everyone has a say and every idea is valid. We don't have a rigid hierarchy, and everyone chips in to get stuff done. Culture is so important to us, that we believe in evaluating it. We've embedded cultural KPIs into our appraisal process.

WHAT NEW AREAS OF INNOVATION WILL YOU BE EXPLORING IN THE YEAR TO COME?

We're always looking for the next cool idea. One of the key areas we look to explore is what we call 'step change' innovation. Looking at interesting technology that we can take from other industries, then applying it to the research sector and the work we do. When you look beyond existing tech aimed at research, it can be a real eye opener.

WHAT PARTICULAR FINDING FROM ACROSS YOUR PROJECTS HAS REALLY SURPRISED YOU OR YOUR CLIENTS?

The headline on our website reads 'human truths, powerfully told', and I think the most fascinating insights are the ones you can relate to as a human being. I'm the father to two amazing boys, and a work life balance is massively important to me. Bedtimes stories are my chance to switch off and connect with my kids. We did some in-home ethnography work at the time the Amazon Echo was released. One of the guys had an Echo in his kids bedroom, and she (the voice of Alexa) read the kid his bedtime story. I found the idea of 'nanny Alexa' both scary, and fascinating. We're currently running our own internal research study called 'techNOlogy' (understanding how brilliant technology is, but also diving into the human anxieties that are emerging due to changes in technological interaction).

WHAT DOES WINNING THE AWARD FOR 'BREAKTHROUGH BUSINESS OF THE YEAR' MEAN TO YOU?

So far we've grown the business organically through word of mouth, and referrals, so it definitely helps to get our name out there. Winning the award on the night was amazing, and clearly there were some sore heads the next day... but we've celebrated it, and now it's down to business. We've got some big ambitions, and we're really just getting started on the journey to where we want to go.

WHAT WOULD YOU LIKE TO SEE MRS DOING MORE OR LESS OF IN 2020?

MRS provides the gold standard in our sector, and we love the heritage and experience it brings. Our hope is that MRS keeps all of the best bits from the past that makes it the amazing industry body that it is, but that is also looks to continually question itself (as we do) and challenge its own traditions to see where it can go.

You can find out more about the finalists and winners of the MRS Awards 2019 at mrs.org.uk/awards

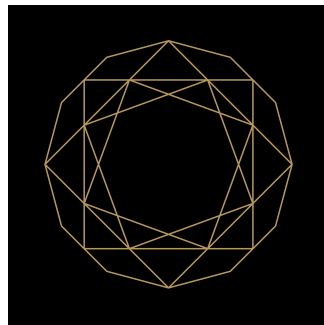
"CULTURE IS SO IMPORTANT TO US, THAT WE BELIEVE IN EVALUATING IT."

Connecting the sector

MRS delivers specialist training, events, awards, qualifications and membership for the research, insight and analytics sector.



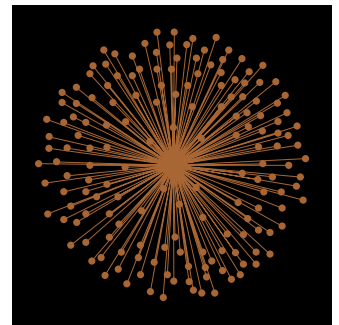
Training and Qualifications



MRS Awards



Research Jobfinder



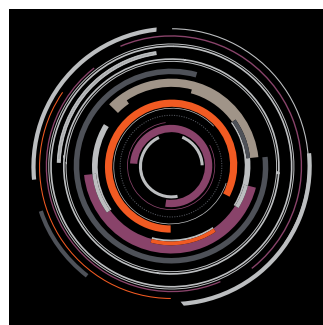
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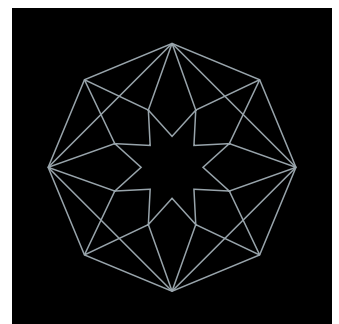
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