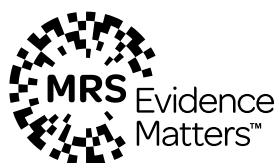


# — THE RESEARCH **LIVE** INDUSTRY REPORT 2022

INCLUDING THE NEW MRS LEAGUE TABLES



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## ACKNOWLEDGEMENTS

Market Research Society (MRS) would like to thank all contributors to this report. In particular, David Barr for compiling the MRS League Tables every year and providing analysis, and David Cahn for reporting on the gender pay gap.

If you have any queries about this report please contact [info@mrs.org.uk](mailto:info@mrs.org.uk) or call 020 7490 4911.

# INTRODUCTION

Jane Frost, chief executive, MRS



## Welcome to the Research Live Industry Report 2022

This report brings together multiple sources of intelligence. The [MRS League Tables](#) are built on 2020 financial data submitted and collected in 2021; the data is focused solely on UK-based turnover and international work managed and invoiced from the UK.

Not many sectors will be reporting growth over such a turbulent period. The growth of 0.8% is thus encouraging. Especially so, since many companies ground to a full stop at the start of the pandemic as clients, quite naturally, underwent a wholesale reappraisal of their needs at such an exceptional time.

Research companies stepped up to deliver vital insight and evidence for both government and the commercial sector and as a result the sector recovered, with reports being generally confident and even optimistic that this small growth will increase. It must be acknowledged, however that the growth we are reporting is very lopsided, being generated in fewer than half of the [top 100 companies in our tables](#).

It is worth looking at the results for the [Oppies awards](#) and the [MRS Awards](#) in 2021 to see the levels of operational excellence, agility and imagination displayed throughout all parts of research.

It's really important to remember that research is a real success story for the UK – 40% of European research output is generated here and the UK ranks only second to the USA in global terms.

For the first time the [MRS League Tables](#) highlight those companies who have signed up to the [MRS Inclusion Pledge](#) and the [MRS Net Zero Pledge](#).

While the rapid adoption of one or both of these pledges by more than 70 research companies puts our sector at the vanguard of change, the analysis of government figures on gender pay gap differentials ([page 17](#)) shows that there is no room for complacency. Whilst research outperforms government reported data for the UK as a whole, at only 1.6%, we still have a long way to go. MRS research shows that the gender pay gap is mirrored by a similar ethnicity pay gap, but we still await the start of government reporting on this metric.

Of course, inclusion is not the least of the problems in which we all, corporately and collectively, have a role to play. Our target for net zero is 2026. As with inclusion this is a challenge that is ambitious but within our reach. I very much hope I will be reporting real progress on both, along with healthy market growth, in next year's industry report.

A handwritten signature in blue ink that reads 'Jane Frost'.

Jane Frost, CBE, chief executive, MRS

# HIGHLIGHTS FROM THIS REPORT



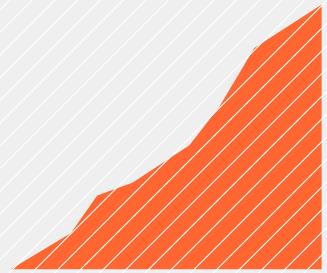
## 7bn

**+40% ON 2016**  
THE VALUE OF THE UK  
RESEARCH, INSIGHT AND  
ANALYTICS INDUSTRY\*



## £4.1bn

**TURNOVER OF TOP 100  
INDIVIDUAL AGENCIES**  
£4.076BN GENERATED  
IN 2020



## 0.8%

**GROWTH**  
YEAR-ON-YEAR FOR  
TOP 100 INDIVIDUAL  
AGENCIES



## 13.8%

**GENDER PAY GAP**  
IN UK RESEARCH  
COMPANIES, VERSUS  
15.4% FOR ALL UK  
BUSINESSES



## 64k

**64,000 EMPLOYEES**  
THE RESEARCH SUPPLY  
INDUSTRY EMPLOYS  
64,000 WORKERS



## 40%

**OF EUROPEAN  
RESEARCH OUTPUT IS  
GENERATED IN THE UK**

\* Research Live Industry Report 2021

# MRS LEAGUE TABLES ANALYSIS

David Barr, league tables compiler

In 2020, the Top 100 individual agencies generated total turnover of £4.076bn. Overall year-on-year growth within these 100 agencies was 0.8%.

A note of caution is essential in relation to the 2020 tables. 2019 was the last full year of pre-COVID-19 trading. 2020 was the year of the most severe lockdown restrictions, adversely affecting most agencies and their clients. Resilience is nonetheless in evidence, with many reporting encouraging levels of recovery anticipated in 2021. The availability of audited annual reports and statutory filings has again been significantly delayed. The 2020 tables therefore contain an unusually high number of compiler's estimates. Every effort has been made to ensure those estimates are as well-informed as possible, but some inaccuracy is inevitable.

## TOTAL TURNOVER AND GROWTH RATES OF TOP 100 INDIVIDUAL AGENCIES

	2015	2016	2017	2018	2019	2020
TOTAL TURNOVER	<b>£2.942bn</b>	<b>£3.026bn</b>	<b>£3.295bn</b>	<b>£3.627bn</b>	<b>£3.756bn</b>	<b>£4.076bn</b>
GROWTH RATE	<b>6.7%</b>	<b>2.8%</b>	<b>6.5%</b>	<b>3.9%</b>	<b>4.8%</b>	<b>0.8%</b>

## NUMBER OF TOP 100 INDIVIDUAL AGENCIES WITH GROWING/DECLINING TURNOVER

	2015	2016	2017	2018	2019	2020
GROWING TURNOVER	<b>72</b>	<b>67</b>	<b>64</b>	<b>57</b>	<b>66</b>	<b>46</b>
DECLINING TURNOVER	<b>28</b>	<b>33</b>	<b>36</b>	<b>43</b>	<b>34</b>	<b>54</b>

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

In the trend data, Total Turnover relates to 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 featured in each particular year. The change in composition each year means that it does not represent growth over the previous year's table. It should not be interpreted as a general growth rate for the whole industry.

### 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: 22 / USA: 19 / 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 USA. Second largest is the UK, disproportionately so when placed in the context of the size of the US economy. The USA is a major investor in the UK-based industry (see above). 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 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.

#### 3. EUROPE

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

### ELIGIBILITY AND COMPILATION METHODOLOGY ELIGIBILITY

Eligible organisations ranked in the MRS 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 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 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, and also regardless of location of ultimate ownership. 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 shows no correlation between scale of turnover and rate of growth.

### **SOURCES**

The tables are compiled in early November 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 some companies, turnover is estimated. Estimates are in italics and tend to be cautious.

Within the tables, previous-year turnover is amended for some 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](mailto:industry.statistics@mrs.org.uk)

# MRS LEAGUE TABLES

## TOP 100 INDIVIDUAL AGENCIES RANKED BY TURNOVER

2020 MRS LEAGUE TABLES, COMPILED NOVEMBER 2021

2020 RANKING NUMBER	CHANGE ON PREVIOUS RANKING	2019 RANKING NUMBER	COMPANY NAME	2020 (£M.)	2019 (£M.)	2018 (£M.)	% CHANGE ON PREVIOUS YEAR	GROWTH RANKING	MRS PLEDGES NET INCLUSION ZERO
1	=	1	Kantar	448.345	462.211	460.168	-3.000%	60	<input type="checkbox"/> <input checked="" type="checkbox"/>
2	▲	4	Ipsos MORI	317.841	245.367	205.974	29.537%	7	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/>
3	▼	2	Gartner	283.950	349.778	261.124	-18.820%	92	<input type="checkbox"/> <input type="checkbox"/>
4	▼	3	Dunnhumby	249.643	260.551	249.162	-4.187%	66	<input type="checkbox"/> <input type="checkbox"/>
5	=	5	Wood Mackenzie	232.141	226.703	209.631	2.399%	41	<input type="checkbox"/> <input type="checkbox"/>
6	=	6	GlobalData	178.400	178.195	157.553	0.115%	46	<input type="checkbox"/> <input type="checkbox"/>
7	=	7	Euromonitor	151.129	140.730	137.395	7.389%	27	<input type="checkbox"/> <input type="checkbox"/>
8	=	8	Mintel	131.886	128.340	120.053	2.763%	39	<input type="checkbox"/> <input type="checkbox"/>
9	=	9	CACI	119.933	111.723	110.713	7.349%	28	<input type="checkbox"/> <input type="checkbox"/>
10	--	--	Verint Systems	116.335	105.195	81.794	10.590%	19	<input type="checkbox"/> <input type="checkbox"/>
11	=	11	IQVIA	74.525	68.118	72.480	9.406%	20	<input type="checkbox"/> <input type="checkbox"/>
12	=	12	Forrester Research	73.500	74.958	64.204	-1.945%	54	<input type="checkbox"/> <input type="checkbox"/>
13	▼	10	AC Nielsen	70.055	108.532	109.810	-35.452%	98	<input type="checkbox"/> <input type="checkbox"/>
14	--	--	Nice Systems	69.699	72.456	80.218	-3.805%	63	<input type="checkbox"/> <input type="checkbox"/>
15	=	15	Informa Telecoms & Media	67.100	53.287	55.324	25.922%	9	<input type="checkbox"/> <input type="checkbox"/>
16	▼	14	Dynata Global UK	64.518	66.176	58.784	-2.505%	58	<input type="checkbox"/> <input checked="" type="checkbox"/>
17	=	17	GfK	56.500	52.084	98.610	8.479%	23	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/>
18	▼	13	Ebiquity	55.907	68.133	69.368	-17.944%	90	<input type="checkbox"/> <input type="checkbox"/>
19	▼	16	Information Resources	51.300	52.346	52.518	-1.998%	55	<input type="checkbox"/> <input type="checkbox"/>
20	▼	19	IDC	48.440	47.688	42.306	1.577%	42	<input type="checkbox"/> <input type="checkbox"/>
21	▼	20	YouGov	47.200	41.200	31.300	14.563%	17	<input type="checkbox"/> <input type="checkbox"/>
22	▼	18	Teradata	45.750	48.037	57.789	-4.761%	71	<input type="checkbox"/> <input type="checkbox"/>
23	=	23	The Research Partnership	40.297	33.248	30.670	21.201%	12	<input type="checkbox"/> <input type="checkbox"/>
24	▼	21	WGSN	37.125	39.608	37.405	-6.269%	77	<input type="checkbox"/> <input type="checkbox"/>
25	--	--	Evaluate	36.598	30.892	26.642	18.471%	14	<input type="checkbox"/> <input type="checkbox"/>

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.)

2020 MRS LEAGUE TABLES, COMPILED NOVEMBER 2021

2020 RANKING NUMBER	CHANGE ON PREVIOUS RANKING	2019 RANKING NUMBER	COMPANY NAME	2020 (£M.)	2019 (£M.)	2018 (£M.)	% CHANGE ON PREVIOUS YEAR	GROWTH RANKING	MRS PLEDGES NET INCLUSION ZERO	
26	▼	22	NatCen	32.755	34.872	33.357	-6.071%	76	<input type="checkbox"/>	<input type="checkbox"/>
27	▲	38	Black Swan Data	32.250	29.961	16.528	7.640%	26	<input type="checkbox"/>	<input type="checkbox"/>
28	--	--	Medallia	29.876	27.344	25.207	9.260%	21	<input type="checkbox"/>	<input type="checkbox"/>
29	▼	24	Hall & Partners	29.750	29.531	28.032	0.742%	45	<input type="checkbox"/>	<input checked="" type="checkbox"/>
30	▲	37	Nielsen Media Research	29.500	14.878	3.607	98.279%	1	<input type="checkbox"/>	<input type="checkbox"/>
31	▲	32	Savanta	25.681	18.701	11.884	37.324%	6	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
32	▼	26	Toluna	24.310	25.654	25.885	-5.239%	72	<input type="checkbox"/>	<input checked="" type="checkbox"/>
33	▼	25	Cello Health Insight	23.750	24.059	25.245	-1.284%	49	<input type="checkbox"/>	<input type="checkbox"/>
34	--	--	Advertising Intelligence	23.550	11.945	9.469	97.154%	2	<input type="checkbox"/>	<input type="checkbox"/>
35	--	--	Sprinklr	21.471	19.390	19.054	10.732%	18	<input type="checkbox"/>	<input type="checkbox"/>
36	▼	33	WorldOne Research	21.309	16.485	18.025	29.263%	8	<input type="checkbox"/>	<input type="checkbox"/>
37	▼	34	MMR Research Worldwide	20.589	17.808	17.290	15.617%	16	<input checked="" type="checkbox"/>	<input type="checkbox"/>
38	▼	28	Connexity	20.550	21.700	20.612	-5.300%	73	<input type="checkbox"/>	<input type="checkbox"/>
39	▼	27	Frost & Sullivan	20.465	22.473	23.345	-8.935%	80	<input type="checkbox"/>	<input type="checkbox"/>
40	▲	42	Prescient Healthcare	19.750	18.808	14.423	5.009%	33	<input type="checkbox"/>	<input type="checkbox"/>
41	▼	30	The Gallup Organisation	19.395	19.106	18.746	1.513%	43	<input type="checkbox"/>	<input type="checkbox"/>
42	▲	47	Basis Research	18.595	13.407	10.547	38.696%	5	<input type="checkbox"/>	<input checked="" type="checkbox"/>
43	▼	29	IHS Markit Economics	18.237	19.385	19.943	-5.922%	75	<input type="checkbox"/>	<input type="checkbox"/>
44	▲	63	Quantexa	17.545	10.238	5.018	71.371%	3	<input type="checkbox"/>	<input type="checkbox"/>
45	▼	40	Yonder Consulting	16.867	13.420	13.483	25.686%	10	<input type="checkbox"/>	<input checked="" type="checkbox"/>
46	▼	36	Confirmit	16.784	17.527	17.755	-4.239%	67	<input type="checkbox"/>	<input type="checkbox"/>
47	▼	43	InSites Consulting UK	16.320	14.956	12.642	9.120%	22	<input type="checkbox"/>	<input type="checkbox"/>
48	▼	31	MaritzCX	16.113	18.763	20.089	-14.124%	87	<input type="checkbox"/>	<input type="checkbox"/>
49	▼	46	Concentra Analytics	16.007	13.412	6.922	19.348%	13	<input type="checkbox"/>	<input type="checkbox"/>
50	▼	39	Kynetec	15.992	16.237	15.142	-1.509%	50	<input type="checkbox"/>	<input type="checkbox"/>

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.)

2020 MRS LEAGUE TABLES, COMPILED NOVEMBER 2021

2020 RANKING NUMBER	CHANGE ON PREVIOUS RANKING	2019 RANKING NUMBER	COMPANY NAME	2020 (£M.)	2019 (£M.)	2018 (£M.)	% CHANGE ON PREVIOUS YEAR	GROWTH RANKING	MRS PLEDGES NET INCLUSION ZERO
51	▼	41	Walnut Unlimited	14.850	15.770	17.737	-5.834%	74	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/>
52	▲	53	Defaqto	14.750	13.818	12.144	6.745%	30	<input type="checkbox"/> <input type="checkbox"/>
53	▲	69	IFF Research	13.953	9.230	8.160	51.170%	4	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/>
54	▼	35	C Space	13.942	17.707	16.850	-21.263%	94	<input type="checkbox"/> <input checked="" type="checkbox"/>
55	▼	48	Ipsos Interactive Services	13.933	13.368	12.864	4.227%	36	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/>
56	▲	86	Edge By Ascential	13.550	16.665	7.013	-18.692%	91	<input type="checkbox"/> <input type="checkbox"/>
57	▼	55	B2B International	13.100	12.609	11.796	3.894%	37	<input type="checkbox"/> <input type="checkbox"/>
58	▼	49	Firefish	12.873	13.081	12.162	-1.590%	52	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/>
59	▼	56	Incite Marketing Planning	12.439	11.781	14.770	5.585%	32	<input type="checkbox"/> <input type="checkbox"/>
60	▼	44	Information Services Group	12.269	12.877	11.692	-4.722%	70	<input type="checkbox"/> <input type="checkbox"/>
61	▼	50	PWC Research	12.255	12.655	12.555	-3.161%	61	<input type="checkbox"/> <input type="checkbox"/>
62	▼	52	Nielsen Book Services	12.175	12.255	12.391	-0.653%	47	<input type="checkbox"/> <input type="checkbox"/>
63	▼	57	The Planning Shop International	11.525	12.764	11.659	-9.707%	82	<input type="checkbox"/> <input type="checkbox"/>
64	▼	60	KPMG Nunwood Consulting	11.025	10.553	9.935	4.473%	35	<input type="checkbox"/> <input type="checkbox"/>
65	▼	64	Harris Interactive	10.943	10.098	9.221	8.368%	24	<input type="checkbox"/> <input checked="" type="checkbox"/>
66	=	66	Behavioural Insights	10.094	9.848	7.183	2.498%	40	<input type="checkbox"/> <input type="checkbox"/>
67	▲	75	2CV	9.875	9.420	8.828	4.830%	34	<input type="checkbox"/> <input checked="" type="checkbox"/>
68	--	--	Merkle Aquila Insight	9.808	11.177	9.091	-12.248%	86	<input type="checkbox"/> <input type="checkbox"/>
69	▲	73	GlobalWebIndex	9.270	8.754	6.956	5.894%	31	<input type="checkbox"/> <input type="checkbox"/>
70	▲	78	Nielsen Sports	9.255	9.169	8.244	0.938%	44	<input type="checkbox"/> <input type="checkbox"/>
71	▼	59	Adelphi International Research	9.150	9.429	11.301	-2.959%	59	<input type="checkbox"/> <input type="checkbox"/>
72	--	--	Yonder Data Solutions	9.116	8.503	8.494	7.209%	29	<input type="checkbox"/> <input checked="" type="checkbox"/>
73	▼	67	MetrixLab	9.023	9.454	8.696	-4.559%	68	<input type="checkbox"/> <input type="checkbox"/>
74	▼	51	Shoppertrak	8.918	13.084	12.218	-31.840%	97	<input type="checkbox"/> <input type="checkbox"/>
75	▼	68	NPD Group	8.820	9.199	8.937	-4.120%	64	<input type="checkbox"/> <input type="checkbox"/>

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.)

2020 MRS LEAGUE TABLES, COMPILED NOVEMBER 2021

2020 RANKING NUMBER	CHANGE ON PREVIOUS RANKING	2019 RANKING NUMBER	COMPANY NAME	2020 (£M.)	2019 (£M.)	2018 (£M.)	% CHANGE ON PREVIOUS YEAR	GROWTH RANKING	MRS PLEDGES NET INCLUSION ZERO
76	▼	71	Consulting at McCann Health	8.750	8.903	8.888	-1.719%	53	<input type="checkbox"/> <input type="checkbox"/>
77	▼	65	Sparkler	8.440	9.900	8.979	-14.747%	88	<input type="checkbox"/> <input type="checkbox"/>
78	▼	45	BVA BDRC	8.068	13.461	13.310	-40.064%	100	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/>
79	▼	58	Flamingo Research	8.025	8.218	11.426	-2.349%	57	<input type="checkbox"/> <input type="checkbox"/>
80	▼	79	Tti Global Research	7.650	7.769	7.770	-1.532%	51	<input type="checkbox"/> <input type="checkbox"/>
81	▲	82	Kokoro	7.567	7.722	7.995	-2.007%	56	<input type="checkbox"/> <input type="checkbox"/>
82	▲	98	Springboard Research	7.388	6.342	5.354	16.493%	15	<input type="checkbox"/> <input type="checkbox"/>
83	▼	62	Strategy Analytics	7.372	10.472	10.394	-29.603%	96	<input type="checkbox"/> <input type="checkbox"/>
84	▼	80	BMG Research	7.161	7.768	7.547	7.814%	78	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/>
85	▼	76	Datamonitor	7.115	8.090	9.728	-12.052%	85	<input type="checkbox"/> <input type="checkbox"/>
86	▲	90	Trinity McQueen	6.985	6.772	6.144	3.145%	38	<input type="checkbox"/> <input checked="" type="checkbox"/>
87	--	--	Opinium Research	6.934	6.433	5.033	7.788%	25	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/>
88	▼	81	Simpson Carpenter	6.868	7.749	7.355	-11.369%	83	<input type="checkbox"/> <input type="checkbox"/>
89	▼	61	Watermelon Research	6.759	10.478	12.096	-35.493%	99	<input type="checkbox"/> <input checked="" type="checkbox"/>
90	▼	74	MARU/edr	6.750	7.082	8.825	-4.688%	69	<input type="checkbox"/> <input type="checkbox"/>
91	▼	72	Breaking Blue Research	6.624	8.599	8.852	-22.968%	95	<input type="checkbox"/> <input type="checkbox"/>
92	▼	87	Verve	6.525	7.081	6.892	-7.852%	79	<input type="checkbox"/> <input type="checkbox"/>
Verve was ranked in 92nd place when this report was first released, based on an estimate of its 2020 income. Information received after publication shows that Verve's UK income for 2020 was £7.230m (equivalent figures for 2019: £5.869m and 2018: £5.224m) which would place it 84th in the 2020 Top 100 Individual Agencies league table with a growth ranking of 11th based on growth of 23.190% between 2019 and 2020.									
93	▼	77	Jigsaw Research	6.502	8.022	7.625	-18.948%	93	<input type="checkbox"/> <input checked="" type="checkbox"/>
94	▲	100	DJS Research	6.291	5.161	5.199	21.895%	11	<input type="checkbox"/> <input type="checkbox"/>
95	▼	70	Quadrangle	6.151	7.237	9.017	-15.006%	89	<input type="checkbox"/> <input checked="" type="checkbox"/>
96	▼	93	Promar International	6.092	6.301	5.899	-3.317%	62	<input type="checkbox"/> <input type="checkbox"/>
97	▼	88	Nielsen Netratings	6.075	6.703	7.082	-9.369%	81	<input type="checkbox"/> <input type="checkbox"/>
98	▼	83	Market Force Information	6.015	6.086	7.626	-1.167%	48	<input type="checkbox"/> <input type="checkbox"/>
99	▼	92	The Nursery Research & Planning	5.718	6.456	5.643	-11.431%	84	<input type="checkbox"/> <input checked="" type="checkbox"/>
100	▼	83	ComScore	5.705	5.953	7.763	-4.166%	65	<input type="checkbox"/> <input type="checkbox"/>
TOTAL				4075.969	4043.642	3786.584			

Those in *italics* are estimated or partially estimated figures

Those marked '--' are new entrants

# MRS LEAGUE TABLES

## TOP 20 FASTEST-GROWING INDIVIDUAL AGENCIES

2020 MRS LEAGUE TABLES, COMPILED NOVEMBER 2021

2020 RANKING	GROWTH RATE	COMPANY NAME	2020 (£M.)	2019 (£M.)	MRS PLEDGES NET INCLUSION ZERO	
1	98.279%	Nielsen Global Media	29.500	14.878	<input type="checkbox"/>	<input type="checkbox"/>
2	97.154%	Advertising Intelligence	23.550	11.945	<input type="checkbox"/>	<input type="checkbox"/>
3	71.371%	Quantexa	17.545	10.238	<input type="checkbox"/>	<input type="checkbox"/>
4	51.170%	IFF Research	13.953	9.230	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
5	38.696%	Basis Research	18.595	13.407	<input type="checkbox"/>	<input checked="" type="checkbox"/>
6	37.324%	Savanta	25.681	18.701	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
7	29.537%	Ipsos MORI	317.841	245.367	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
8	29.263%	WorldOne Research	21.309	16.485	<input type="checkbox"/>	<input type="checkbox"/>
9	25.922%	Informa Telecoms & Media	67.100	53.287	<input type="checkbox"/>	<input type="checkbox"/>
10	25.686%	Yonder Consulting	16.867	13.420	<input type="checkbox"/>	<input checked="" type="checkbox"/>
* <u>Verve</u>						
11	21.895%	DJS Research	6.291	5.161	<input type="checkbox"/>	<input type="checkbox"/>
12	21.201%	The Research Partnership	40.297	33.248	<input type="checkbox"/>	<input type="checkbox"/>
13	19.348%	Concentra Analytics	16.007	13.412	<input type="checkbox"/>	<input type="checkbox"/>
14	18.471%	Evaluate	36.598	30.892	<input type="checkbox"/>	<input type="checkbox"/>
15	16.493%	Springboard Research	7.388	6.342	<input type="checkbox"/>	<input type="checkbox"/>
16	15.617%	MMR Research Worldwide	20.589	17.808	<input checked="" type="checkbox"/>	<input type="checkbox"/>
17	14.563%	YouGov	47.200	41.200	<input type="checkbox"/>	<input type="checkbox"/>
18	10.732%	Sprinklr	21.471	19.390	<input type="checkbox"/>	<input type="checkbox"/>
19	10.590%	Verint Systems	116.335	105.195	<input type="checkbox"/>	<input type="checkbox"/>
20	9.406%	IQVIA	74.525	68.118	<input type="checkbox"/>	<input type="checkbox"/>

Those in *italics* are estimated or partially estimated figures

\* Information received after publication of this report shows that Verve's UK income grew by 23.190% in 2020, which would place it 11th in the Top 100 Individual Agency 2020 growth table.

# MRS LEAGUE TABLES

## TOP 50 CONSOLIDATED BUSINESSES RANKED BY TURNOVER

2020 MRS LEAGUE TABLES, COMPILED NOVEMBER 2021

2020 RANKING NUMBER	CHANGE ON PREVIOUS RANKING	2019 RANKING NUMBER	COMPANY NAME	2020 (£M.)	2019 (£M.)	2018 (£M.)	% CHANGE ON PREVIOUS YEAR	GROWTH RANKING	MRS PLEDGES NET INCLUSION ZERO
1	=	1	Kantar	448.345	462.211	460.168	-3.000%	34	<input type="checkbox"/> <input checked="" type="checkbox"/>
2	▲	3	Ipsos	336.061	265.488	226.076	26.582%	6	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/>
3	▼	2	Gartner	283.950	349.778	261.124	-18.820%	48	<input type="checkbox"/> <input type="checkbox"/>
4	=	4	Dunnhumby	249.643	260.551	249.162	-4.187%	37	<input type="checkbox"/> <input type="checkbox"/>
5	=	5	Wood Mackenzie	232.141	226.703	209.631	2.399%	25	<input type="checkbox"/> <input type="checkbox"/>
6	=	6	GlobalData	178.400	178.195	157.553	0.115%	28	<input type="checkbox"/> <input type="checkbox"/>
7	▲	8	Euromonitor	151.129	140.730	137.395	7.389%	21	<input type="checkbox"/> <input type="checkbox"/>
8	▲	9	Mintel	131.886	128.340	120.053	2.763%	24	<input type="checkbox"/> <input type="checkbox"/>
9	▲	10	CACI	119.933	111.723	110.713	7.349%	22	<input type="checkbox"/> <input type="checkbox"/>
10	--	--	Verint Systems	116.335	105.195	81.794	10.590%	15	<input type="checkbox"/> <input type="checkbox"/>
11	--	--	Nielsen Global Media	80.550	43.005	31.324	87.304%	1	<input type="checkbox"/> <input type="checkbox"/>
12	▼	11	IQVIA	74.525	68.118	72.480	9.406%	16	<input type="checkbox"/> <input type="checkbox"/>
13	▲	14	Informa	74.215	61.377	65.052	20.917%	8	<input type="checkbox"/> <input type="checkbox"/>
14	▼	12	Forrester Research	73.500	74.958	64.204	-1.945%	31	<input type="checkbox"/> <input type="checkbox"/>
15	▲	16	Omnicom/DAS	72.392	77.654	77.429	-6.776%	43	<input type="checkbox"/> <input type="checkbox"/>
16	--	--	Nielsen IQ	70.055	108.532	109.810	-35.452%	50	<input type="checkbox"/> <input type="checkbox"/>
17	--	--	Nice Systems	69.699	72.456	80.218	-3.805%	36	<input type="checkbox"/> <input type="checkbox"/>
18	▼	15	Dynata Global UK	64.518	66.176	58.784	-2.505%	33	<input type="checkbox"/> <input checked="" type="checkbox"/>
19	▼	18	GfK	56.500	52.084	98.610	8.479%	19	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/>
20	▼	13	Ebiquity	55.907	68.133	69.368	-17.944%	47	<input type="checkbox"/> <input type="checkbox"/>
21	▼	17	Information Resources	51.300	52.346	52.518	-1.998%	32	<input type="checkbox"/> <input type="checkbox"/>
22	▼	19	Ascential	50.675	56.273	44.418	-9.948%	45	<input type="checkbox"/> <input type="checkbox"/>
23	▼	21	IDC	48.440	47.688	42.306	1.577%	26	<input type="checkbox"/> <input type="checkbox"/>
24	▼	23	YouGov	47.200	41.200	31.300	14.563%	13	<input type="checkbox"/> <input type="checkbox"/>
25	▼	20	Teradata	45.750	48.037	57.789	-4.761%	39	<input type="checkbox"/> <input type="checkbox"/>

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.)

2020 MRS LEAGUE TABLES, COMPILED NOVEMBER 2021

2020 RANKING NUMBER	CHANGE ON PREVIOUS RANKING	2019 RANKING NUMBER	COMPANY NAME	2020 (£M.)	2019 (£M.)	2018 (£M.)	% CHANGE ON PREVIOUS YEAR	GROWTH RANKING	MRS PLEDGES NET INCLUSION ZERO
26	▼	22	Cello Health	42.249	42.540	43.799	-0.684%	29	<input type="checkbox"/> <input type="checkbox"/>
27	▼	26	The Research Partnership	40.297	33.248	30.670	21.201%	7	<input type="checkbox"/> <input type="checkbox"/>
28	--	--	Evaluate	36.598	30.892	26.642	18.471%	11	<input type="checkbox"/> <input type="checkbox"/>
29	▼	24	Toluna Group	35.253	35.752	35.106	-1.396%	30	<input type="checkbox"/> <input checked="" type="checkbox"/>
30	▼	25	NatCen	32.755	34.872	33.357	-6.071%	42	<input type="checkbox"/> <input type="checkbox"/>
31	▲	39	Black Swan Data	32.250	29.961	16.528	7.640%	20	<input type="checkbox"/> <input type="checkbox"/>
32	--	--	Medallia	29.876	27.344	25.207	9.260%	17	<input type="checkbox"/> <input type="checkbox"/>
33	▼	31	Yonder Group	25.983	21.923	21.977	18.519%	10	<input type="checkbox"/> <input checked="" type="checkbox"/>
34	=	34	Savanta	25.681	18.701	11.884	37.324%	4	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/>
35	▲	40	Dentsu International	22.908	23.786	20.887	-3.691%	35	<input type="checkbox"/> <input type="checkbox"/>
36	--	--	Sprinklr	21.471	19.390	19.054	10.732%	14	<input type="checkbox"/> <input type="checkbox"/>
37	▼	35	WorldOne Research	21.309	16.485	18.025	29.263%	5	<input type="checkbox"/> <input type="checkbox"/>
38	▼	36	MMR Research Worldwide	20.589	17.808	17.290	15.617%	12	<input checked="" type="checkbox"/> <input type="checkbox"/>
39	▼	29	Connexity	20.550	21.700	20.612	-5.300%	40	<input type="checkbox"/> <input type="checkbox"/>
40	▼	28	Frost & Sullivan	20.465	22.473	23.345	-8.935%	44	<input type="checkbox"/> <input type="checkbox"/>
41	▼	27	BVA-BDRC Group	20.278	30.616	28.957	-33.767%	49	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/>
42	▲	43	Prescient Healthcare	19.750	18.808	14.423	5.009%	23	<input type="checkbox"/> <input type="checkbox"/>
43	▼	32	The Gallup Organisation	19.395	19.106	18.746	1.513%	27	<input type="checkbox"/> <input type="checkbox"/>
44	▲	47	Basis Research	18.595	13.407	10.547	38.696%	3	<input type="checkbox"/> <input checked="" type="checkbox"/>
45	▼	30	IHS Markit Economics	18.237	19.385	19.943	-5.922%	41	<input type="checkbox"/> <input type="checkbox"/>
46	--	--	Quantexa	17.545	10.238	5.018	71.371%	2	<input type="checkbox"/> <input type="checkbox"/>
47	▼	38	Confirmit	16.784	17.527	17.755	-4.239%	38	<input type="checkbox"/> <input type="checkbox"/>
48	▼	44	Insites Consulting UK	16.320	14.956	12.642	9.120%	18	<input type="checkbox"/> <input type="checkbox"/>
49	▼	33	MaritxCX	16.113	18.763	20.089	-14.124%	46	<input type="checkbox"/> <input type="checkbox"/>
50	▼	46	Concentra Analytics	16.007	13.412	6.922	19.348%	9	<input type="checkbox"/> <input type="checkbox"/>

Those in *italics* are estimated or partially estimated figures

Those marked '--' are new entrants

# MRS LEAGUE TABLES

## TOP 20 FASTEST-GROWING BUSINESSES

2020 MRS LEAGUE TABLES, COMPILED NOVEMBER 2021

2020 RANKING	GROWTH RATE	COMPANY NAME	2020 (£M.)	2019 (£M.)	MRS PLEDGES NET INCLUSION ZERO	
1	87.304%	Nielsen Global Media	80.550	43.005	<input type="checkbox"/>	<input type="checkbox"/>
2	71.371%	Quantexa	17.545	10.238	<input type="checkbox"/>	<input type="checkbox"/>
3	38.696%	Basis Research	18.595	13.407	<input type="checkbox"/>	<input checked="" type="checkbox"/>
4	37.324%	Savanta	25.681	18.701	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
5	29.263%	WorldOne Research	21.309	16.485	<input type="checkbox"/>	<input type="checkbox"/>
6	26.582%	Ipsos	336.061	265.488	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
7	21.201%	The Research Partnership	40.297	33.248	<input type="checkbox"/>	<input type="checkbox"/>
8	20.917%	Informa	74.215	61.377	<input type="checkbox"/>	<input type="checkbox"/>
9	19.348%	Concentra Analytics	16.007	13.412	<input type="checkbox"/>	<input type="checkbox"/>
10	18.519%	Yonder Group	25.983	21.923	<input type="checkbox"/>	<input checked="" type="checkbox"/>
11	18.471%	Evaluate	36.598	30.982	<input type="checkbox"/>	<input type="checkbox"/>
12	15.617%	MMR Research Worldwide	20.589	17.808	<input checked="" type="checkbox"/>	<input type="checkbox"/>
13	14.563%	YouGov	47.200	41.200	<input type="checkbox"/>	<input type="checkbox"/>
14	10.732%	Sprinklr	21.471	19.390	<input type="checkbox"/>	<input type="checkbox"/>
15	10.590%	Verint Systems	116.335	105.195	<input type="checkbox"/>	<input type="checkbox"/>
16	9.406%	IQVIA	74.525	68.118	<input type="checkbox"/>	<input type="checkbox"/>
17	9.260%	Medallia	29.876	27.344	<input type="checkbox"/>	<input type="checkbox"/>
18	9.120%	InSites Consulting UK	16.320	14.956	<input type="checkbox"/>	<input type="checkbox"/>
19	8.479%	GfK	56.500	52.084	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
20	7.640%	Black Swan Data	32.250	29.961	<input type="checkbox"/>	<input type="checkbox"/>

Those in *italics* are estimated or partially estimated figures

# NOTES ON MRS LEAGUE TABLES

## TOP 100 INDIVIDUAL AGENCIES

**Entry 2:** IpsosMORI. This result includes the REACT Study on the impact of Covid-19, undertaken in partnership with the Department of Health & Social Care and Imperial College London.

**Entry 13:** ACNielsen is now part of Nielsen IQ. See Entry 16 in the Notes for Consolidated Businesses.

**Entry 15:** Informa Telecoms & Media. See Entry 13 in the Notes for Consolidated Businesses.

**Entry 34:** Advertising Intelligence was sold to Nielsen in late 2018 by Ebiquity where it had formed 90% of the Ebiquity Marketing Intelligence Division. The agency now operates as a subsidiary of Nielsen Media Research within Nielsen Global Media (see Entry 11 in the Notes for Consolidated Businesses).

**Entry 50:** Kynetec merged in early 2020 with Kleffmann Group, combining two research specialists in agriculture and animal health.

**Entry 52:** Defaqto's ultimate holding company from March 2019 is The SimplyBiz Group plc.

**Entry 53:** IFF Research. This result includes the full-year impact of the acquisition in mid-2019 of Voluntas, a research and software customer intelligence agency specialising in the social housing sector.

**Entry 56:** Edge By Ascential. The large increase in turnover in 2019 was attributable to the transfer of business from elsewhere in Ascential plc – Brandview, e-Possibilities, OneClickRental, and Clavis Insight.

**Entry 59:** Incite Marketing Planning was part of Kin+Carta during 2020. In late 2021 Incite was acquired by Strat7.

**Entry 73:** MetrixLab is part of Macromill Group, a global online consumer insights and analytics group, headquartered in Tokyo.

**Entry 76:** Consulting at McCann Health is part of the Interpublic Group.

**Entry 77:** Sparkler is part of PA Consulting Group.

**Entry 86:** Trinity McQueen. This result includes the impact of the acquisition in late 2019 of Allto Market Research (formerly McCallum Layton).

**Entry 89:** Watermelon Research is part of Chime, owned by Providence Equity Partners.

**Entry 92:** Verve. At the end of 2020 it was announced that Verve and Potentiate would merge in the UK as part of a wider global strategic partnership. The deal is intended to create a global integrated CX and community panel platform.

**Entry 94:** DJS Research became employee-owned during 2020.

**Entry 99:** The Nursery Research & Planning became employee-owned in late 2020.

## TOP 50 CONSOLIDATED BUSINESSES

**Entry 1:** Kantar is 60% owned by US private equity group Bain Capital and 40% by WPP plc (its original owner).

**Entry 2:** Ipsos includes IpsosMORI, Ipsos Interactive Services, and Ipsos Retail Performance.

**Entry 3:** Gartner – the substantial increase in turnover in 2019 includes the impact of acquisition of CEB Global.

**Entry 4:** Dunnhumby is wholly owned by Tesco plc.

**Entry 5:** Wood Mackenzie is part of Verisk Analytics, a US-based energy sector data group. During 2019 Verisk acquired Genscape and integrated it into Wood Mackenzie.

**Entry 11:** Nielsen Global Media was created following the split of Nielsen in 2020 into two separate businesses. It includes Nielsen Media Research, Advertising Intelligence, Nielsen Netratings, Nielsen Book Services, and Nielsen Sports.

**Entry 13:** Informa includes Datamonitor and Informa Telecoms & Media (to be re-named OMDIA in 2021). In mid-2019 Informa acquired the IHS Markit TMT portfolio in exchange for its Agricultural Intelligence Group.

**Entry 15:** Omnicom/DAS includes Hall & Partners, Flamingo Research, Adelphi International Research, The Planning Shop International, and C Space (part of Interbrand Group).

**Entry 16:** Nielsen IQ was created following the split of Nielsen in 2020 into two separate businesses. Initially named Nielsen Global Connect, Nielsen described it as “the gold standard in retail measurement, with exceptional insights and unrivalled scale”. For the time being, ACNielsen is the only UK-based agency within Nielsen IQ. As part of the split ACNielsen spun off its media and related activities to Nielsen Media Research. In late 2020 Nielsen Connect was sold to private equity investor Advent International and was renamed Nielsen IQ, with a license to brand its products and services with the Nielsen name for twenty years.

**Entry 18:** Dynata Global UK was created by the merger of Research Now and SSI. The combined business is held by Court Square Capital Partners and HGGC as majority owners.

**Entry 21:** Information Resources UK is a wholly owned subsidiary of IRI Group Holdings Inc. Vestar and New Mountain Capital have joint control of IRI Group.

**Entry 22:** Ascential includes WGSN (a trend forecasting company) and Edge by Ascential (formerly Planet Retail). See also Note on Entry 56 in the Notes to the Top 100 Individual Agencies).

**Entry 26:** Cello Health was taken private in mid-2020 by Arsenal Capital Partners, a private equity firm which invests in healthcare and specialty industrial companies. At the end of 2020 it was announced that Breaking Blue Research and 2CV would merge under the 2CV name as a “Cello Health Insight Business”. Breaking Blue Research had been formed in 2015 through the amalgamation of four agencies – Consensus Research, Leapfrog, mruk, and RS Consulting.

**Entry 29:** Toluna Group was previously known as ITWP, and is the holding company for Toluna, Harris Interactive Europe, and KuRunData. The group is privately held by investors including CEO Frederic-Charles Petit.

**Entry 33:** Yonder Group was previously Populus Group and was created in late 2020 by bringing together Yonder Consulting, Yonder Data Solutions, Decidedly, and BrandCap.

**Entry 34:** Savanta is the insights and intelligence division of Next Fifteen Communications. This result reflects the acquisition in August 2019 of Comres and in February 2020 of the UK division of Future Thinking.

**Entry 35:** Dentsu International (formerly Dentsu Aegis Network) includes B2B International and Merkle Aquila Insight. In late 2020 Dentsu announced the formation of a new agency called Merkle B2B pulling together five subsidiaries.

**Entry 38:** MMR Research Worldwide is part of MMR Group which has worldwide turnover in excess of £45m. Information on turnover of other UK-based business within the group is not available.

**Entry 41:** BVA-BDRC Group includes BVA-BDRC, ESA Retail, Perspective Research Services, Alligator Digital, and Viewpoint.

**Entry 46:** Quantexta is majority owned by Accenture.

**Entry 47:** Confirmit was sold in early 2020 to private equity firm Verdane, with equity growth investor Zobito as co-investor. Verdane is an investor in Dapresy (a data visualisation reporting firm) which it will merge with Confirmit. At the beginning of 2021 Confirmit announced its intention to merge with insights software business FocusVision to create a combined business called FORSTA.

**Entry 48:** InSites Consulting Group UK was formed via the acquisition in 2019 by InSites Consulting of Join The Dots.

# Pledge to make a difference in 2022

A dark grey circular graphic with a border of small, multi-colored squares (grey, orange, white). The text "Manifesto for Opportunity" is written in a curve along the top inner edge of the circle.

## MRS Inclusion Pledge

### A manifesto for opportunity

The research sector is taking steps to ensure that it is representative of the world around us.

- ✓ Publishing annual pay statistics
- ✓ Diversity at board level

**Sign up the** MRS Inclusion Pledge.

### A manifesto for sustainability

The research sector is taking steps to be part of the solution to the growing climate emergency.

- ✓ Delivering net zero by 2026
- ✓ Publishing carbon emissions

**Sign up to the** MRS Net Zero pledge

A green circular graphic with a border of small, multi-colored squares (green, white, grey, purple). The text "Manifesto for Sustainability" is written in a curve along the top inner edge of the circle.

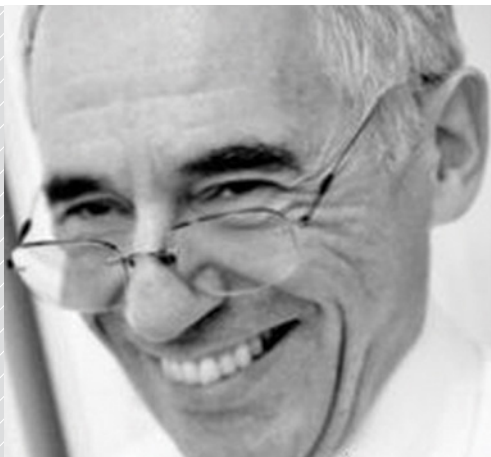
## MRS Net Zero Pledge

[www.mrs.org.uk](http://www.mrs.org.uk)



# GENDER PAY GAP IN THE UK RESEARCH SECTOR

*David Cahn, principal at synygis consulting*



The UK research industry's gender pay gap is broadly consistent with the national average, and the research gap has slightly narrowed since the start of mandatory reporting in 2018.

The gender pay gap is the difference between average male and average female pay in an organisation.<sup>1</sup> The gender pay gap is not the same as unequal pay, where men and women are paid differently for performing the same, or similar, work (unequal pay has been unlawful since 1970).

**In April 2018, companies (those with more than 250 employees) were required for the first time to publish their gender pay gap.**

For the UK as a whole<sup>2</sup>, the 2020–2021 gender pay gap was +15.4%, i.e. hourly pay for females was 15.4% lower than for males, meaning females earn 84.6p for every £1 that men earn when comparing hourly pay.

The 2020–2021 gender pay gap for research companies in the UK was +13.8%.<sup>3</sup>

Just one research organisation, NatCen, reported an hourly pay gap in favour of females (–18.0%), while another three claimed hourly pay parity between females and males. Across the other 20 research companies reporting in 2021, the hourly pay gap favoured males. This is broadly consistent with the proportions for all 10,099 companies reporting in 2021 – 14% with a gender pay gap in favour of females, 8% at parity, and 78% with a gap in favour of males.

The median gap for bonus pay among research companies was rather less female-friendly – +32.1% in favour of males. Only one company, (IFF Research), returned a bonus pay gap in favour of females (–3.8%). The male-oriented bonus gaps ranged from +1.3% (Sensory Dimensions) to +71.4% (Gartner).

On the other hand, the percentage being awarded a bonus at all was balanced much more evenly by gender. Among females, 55.4% were in receipt of a bonus (males, 57.7%), and 10 of the 24 returning 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 the 10,099 larger companies reporting in 2021, both in total (49.4% vs. 47.6%), and also within each pay quartile.

The gender pay gap is slowly but steadily narrowing over time. For the UK as a whole, the gap has shrunk by almost a half since it was first systematically estimated at +27.5% in 1997. Since 2018, when mandatory reporting for larger companies was introduced, the national gap has narrowed by 2.4%, from +17.8% to +15.4%.

Over the same period, the research gap among the 22 companies who reported in 2018 and again in 2021, has shrunk by 0.9%, from +15.5% to +14.6%. Between 2018 and 2021, 13 research companies improved female pay year on year by shrinking the pay gap in favour of males, while seven oversaw a deterioration in female pay by expanding the pay gap in favour of males.<sup>4</sup>

The two companies achieving the largest narrowing of the pay gap between 2018 and 2021 were Markit (+13.0%, down from +25.3%), and the UK Statistics Authority (0.0%, down from +10.9%).

Taken as a whole, female representation either overall, or in the top pay quartile, did not increase among the 22 research companies reporting in both 2021 and 2018. But there were some notable individual successes. Fourteen research companies managed to increase the proportion of females in the top pay quartile, while 12 research companies grew their proportion of female employees overall.

Pay gap analysis and discussion has now broadened well beyond gender, and ONS has published reports on both ethnicity and disability pay gaps.<sup>5</sup> Among research companies, Ipsos MORI has led the field in publicising the ethnicity of their workforce, and the ethnicity pay gap.<sup>6</sup> Hopefully other research businesses will be encouraged to follow suit in the near future.

<sup>1</sup> 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.

<sup>2</sup> The Annual Survey of Hours and Earnings (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 all employee jobs registered to PAYE schemes, with 140,000 responses analysed in 2021.

<sup>3</sup> 13.8% is the average of the reported medians from the 24 larger research companies who published their gender pay gap information in 2021. Although these companies have large workforces, with at least 250 employees, ONS analysis shows that the gender pay gap is similar across all companies of all sizes, apart from the smallest with fewer than 10 employees. So it seems reasonable to apply the 13.8% estimate to all research businesses, regardless of size.

The reduced response rate for ASHE 2021 means that analysis by 4-digit SIC codes has not been published, the cell sizes being insufficient, so estimates for SIC 7320 or 7220 are not available.

<sup>4</sup> 2 reported a 0% gap in both years.

<sup>5</sup> <https://www.ons.gov.uk/employmentandlabourmarket/peopleinwork/earningsandworkinghours/articles/ethnicitypaygapsingreatbritain/2019>  
<https://www.ons.gov.uk/peoplepopulationandcommunity/healthandsocialcare/disability/articles/disabilitypaygapsintheuk/2018>

<sup>6</sup> <https://www.ipsos.com/ipsos-mori/en-uk/gender-and-ethnicity-pay-gap-report>

**“TAKEN AS A WHOLE, FEMALE REPRESENTATION EITHER OVERALL, OR IN THE TOP PAY QUARTILE, DID NOT INCREASE AMONG THE 22 RESEARCH COMPANIES REPORTING IN BOTH 2021 AND 2018. BUT THERE WERE SOME NOTABLE INDIVIDUAL SUCCESSES.”**

# GENDER PAY GAP IN THE UK RESEARCH SECTOR

## INDIVIDUAL CALCULATIONS FROM RESEARCH COMPANY RETURNS

	% DIFFERENCE IN HOURLY RATE (MEDIAN) 2021	% DIFFERENCE IN BONUS PAY (MEDIAN) 2021	% WHO RECEIVED BONUS PAY (MALES) 2021	% WHO RECEIVED BONUS PAY IN (FEMALES) 2021	% FEMALES IN LOWER PAY QUARTILE 2021	% FEMALES IN LOWER MIDDLE PAY QUARTILE 2021	% FEMALES IN UPPER MIDDLE PAY QUARTILE 2021	% FEMALES IN TOP PAY QUARTILE 2021	TOTAL FEMALES 2021
ASHE 2021 (n=140,000)	15.4%								
Average for All Companies Reporting Gender Pay Gap 2021 (n=10,099)			36.5%	35.4%	54.6%	50.1%	45.6%	40.1%	47.6%
Research Companies Reporting Gender Pay Gap 2021 (n=24)	13.8%	32.1%	57.7%	55.4%	57.1%	53.0%	47.3%	40.2%	49.4%
National Centre for Social Research	-18.0%	61.4%	1.0%	1.0%	46.0%	59.0%	79.0%	68.0%	63.0%
IFF Research	0.0%	-3.8%	84.9%	83.2%	67.0%	54.0%	45.0%	52.0%	54.5%
UK Statistics Authority	0.0%	0.0%	70.5%	73.3%	56.0%	61.9%	57.3%	48.5%	55.9%
Sensory Dimensions	0.0%	1.3%	100.0%	100.0%	93.0%	79.0%	85.0%	89.0%	86.5%
Merkle UK Three	0.7%	38.2%	16.3%	11.2%	54.8%	47.3%	55.9%	44.1%	50.5%
Perspective Research Services	1.7%	25.5%	25.4%	26.4%	58.3%	54.2%	44.4%	51.0%	52.0%
Nielsen	4.2%	20.8%	59.0%	60.0%	53.0%	53.0%	55.0%	44.0%	51.3%
Ipsos MORI	4.9%	32.5%	44.1%	39.5%	52.0%	65.0%	59.0%	49.0%	56.3%
Kantar	9.0%	24.0%	38.0%	43.0%	49.0%	54.0%	47.0%	37.0%	46.8%
GlobalData	11.4%	67.3%	49.3%	29.8%	37.7%	39.5%	41.4%	21.3%	35.0%
Walnut Unlimited	12.2%	25.8%	17.7%	9.4%	70.0%	70.0%	67.7%	51.6%	64.8%
Markit Group	13.0%	20.4%	87.0%	91.0%	38.0%	30.0%	27.0%	20.0%	28.8%
Euromonitor International	15.2%	35.0%	80.0%	74.0%	66.0%	43.0%	47.0%	49.0%	51.3%
Informa (Busines Intelligence Division)	16.4%	58.9%	42.0%	34.2%	54.3%	42.7%	40.7%	28.7%	41.6%
MaritzCX	18.3%	55.7%	11.8%	9.6%	62.5%	66.7%	52.1%	45.8%	56.8%
IQVIA	18.7%	10.0%	83.6%	81.8%	71.7%	63.2%	59.6%	45.6%	60.0%
Dunnhumby	19.7%	27.0%	79.8%	81.7%	61.9%	50.0%	38.7%	31.1%	45.4%
CACI	20.8%	25.4%	42.8%	52.6%	34.0%	32.0%	14.0%	18.0%	24.5%
Verint	22.6%	18.9%	90.0%	82.0%	33.3%	28.7%	13.2%	13.2%	22.1%
Mintel Group	27.5%	10.6%	43.6%	37.6%	61.8%	63.7%	43.5%	39.8%	52.2%
YouGov	30.0%	56.0%	69.0%	60.0%	59.0%	51.0%	51.0%	28.0%	47.3%
Gartner UK	32.1%	71.4%	99.0%	98.0%	58.0%	53.0%	38.0%	23.0%	43.0%
GfK UK	33.9%	37.1%	67.1%	75.8%	61.4%	53.0%	27.7%	27.0%	42.3%
Information Resources (UK)	36.6%	51.5%	82.6%	74.3%	72.5%	58.4%	46.7%	40.0%	54.4%

# GENDER PAY GAP IN THE UK RESEARCH SECTOR

## COMPARISON OF RESEARCH COMPANY RETURNS 2021 VS 2018

	% DIFFERENCE IN HOURLY RATE (MEDIAN) 2021 VS 2018	% DIFFERENCE IN BONUS PAY (MEDIAN) 2021 VS 2018	% FEMALES IN TOP PAY QUARTILE 2021 VS 2018	TOTAL FEMALES 2021 VS 2018
ASHE 2021 (n=140,000)				
Average for All Companies Reporting Gender Pay Gap 2021 (n=10,099)				
Research Companies Reporting Gender Pay Gap in 2021 and in 2018 (n=22)	-0.8%	2.4%	0.8%	0.6%
National Centre for Social Research	-3.0%	61.4%	-7.0%	-1.8%
IFF Research	0.0%	-3.8%	3.0%	-1.7%
UK Statistics Authority	-10.9%	0.0%	5.5%	1.2%
Sensory Dimensions	0.0%	-39.1%	-2.0%	8.5%
Merkle UK Three	n/a	n/a	n/a	n/a
Perspective Research Services	1.4%	25.5%	-3.5%	-3.2%
Nielsen	-2.0%	-12.6%	2.0%	1.8%
Ipsos MORI	5.8%	-17.8%	5.5%	4.3%
Kantar	n/a	n/a	n/a	n/a
GlobalData	-3.4%	10.6%	0.4%	-0.4%
Walnut Unlimited	-7.8%	21.3%	-22.4%	-21.2%
Markit Group	-12.3%	-12.9%	-8.0%	-9.5%
Euromonitor International	-6.4%	8.0%	8.0%	-0.5%
Informa (Busines Intelligence Division)	4.6%	42.2%	5.7%	6.7%
MaritzCX	4.8%	14.1%	-3.6%	7.6%
IQVIA	-3.5%	-11.3%	10.2%	14.2%
Dunnhumby	-0.2%	1.8%	6.6%	3.4%
CACI	-5.7%	20.3%	0.0%	-2.3%
Verint	-6.8%	-58.1%	0.2%	-1.2%
Mintel Group	15.1%	-7.9%	2.2%	2.6%
YouGov	1.3%	28.5%	6.0%	5.3%
Gartner UK	0.3%	9.0%	8.0%	2.0%
GfK UK	11.9%	-10.6%	-2.0%	-4.5%
Information Resources (UK)	-2.5%	-18.0%	2.2%	1.9%

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# PERSPECTIVES FROM THE FASTEST GROWERS

*Colette Doyle, acting editor (maternity cover),  
Research Live & Impact magazine*



This has been another trying year for the market research industry, so it's good to see that growth has still been possible. Strategies for success outlined by a number of top agencies include, in the words of Ipsos MORI chief executive Kelly Beaver, "continuing to stay close to our clients, as well as keeping focused on looking after our people throughout a very challenging time".

Over at MMR Research Worldwide, global CEO Mat Lintern makes mention of several initiatives the company has undertaken to help it stay at the top of its game, referencing in particular the need to adapt to a changing world. “There was an almost instant requirement to adapt management, communication, office environments, career development and recruitment, both for an increasingly online world, but also one where staff don’t necessarily want the same old ways of working. This requires fluidity, creativity, willingness to listen and an eagerness to embrace fundamental attitudinal changes.”

He elaborates further on the methods implemented by MMR to ensure a favourable outcome for the business. “[We focused on] efficiency-based areas, like quality off-shoring to our teams in India, Colombia and South Africa, plus automation across many elements of the research process, as well as leveraging tech to help with inter-departmental and inter-regional communication and resourcing.” The MMR chief executive also highlights the importance of tech-driven advancements: “increased use of artificial intelligence (AI) in quantitative and qualitative situations, video coming even more to the fore, and building stronger client partnerships to shape more focused innovation via our Nova function.”

Managing director Jan Shury explains how IFF Research adapted to this fast-changing environment. “We have continued to adapt the ways in which we operate. We developed our homeworker telephone centre in 2017 and have continued to invest in its growth, through technology and training, allowing us to collate primary data at scale with speed and agility.”

He adds: “By adopting a more flexible working model we’ve been able to attract talent from across the country and employ people who might have been prevented from taking London-based office roles. We’ve also adapted our recruitment processes to be more inclusive and attract other areas of the labour market.”

To achieve this growth, there has been a mix of organic activity, as well as movement in the mergers and acquisitions sphere; to wit, Savanta, whose CEO Roger Perowne comments: “We have grown rapidly through a mixture of organic growth and by acquiring businesses in the UK and Americas (with Asia on the horizon). The combination of local expertise from our new colleagues and our welcoming culture has proved to be successful.”

Ipsos and MMR both report that growth has mainly been organic, although the former points to “some high synergy tech acquirers and a fantastic acquisition in the employee experience (EX) space, most recently with Karian and Box joining the team”. As well as expanding its UK, South African and Brazilian offices and concentrating on its core fast-moving consumer goods client base, while increasing the range of services offered, MMR also acquired The Together Agency. According to Lintern, this venture “adds creative, digital and social capabilities to our family of brands. We’d not rule out further acquisitions in the future, either to grow capacity in our core research space, or to explore adjacencies in the marketing services area.”

In terms of innovation, all of the agencies contacted for comment had something of interest to report. At DJS Research, chairman Danny Sims notes that the firm was already delivering a range of digital research solutions, “such as online communities, mobile ethnography and app-based solutions. At the same time, we have also seen growth in more traditional approaches – our in-house telephone unit has had its busiest year since we began.”

Sims also comments on the growing gulf between real-world and digital solutions: “While the pandemic has accelerated the shift towards online solutions, it has also brought the digital divide into sharp focus and we have seen increased demand for mixed-mode approaches as a result. A blend of innovative and traditional methodologies has allowed us to design more inclusive research programmes and we see this as a trend that is likely to continue.”

At Ipsos MORI, Beaver notes that the agency is continuing to develop its advisory offering and data integration services, as well as “creating some fantastic new tools including Knowledge Panel UK, Ipsos Digital, and IRIS to name a few. We have also expedited our push into the sustainability research space to support our private and public sector clients.”

Meanwhile, Savanta’s Perowne says he believes that one of the benefits of being able to attract new companies to join the group is “the pool of talent they bring with key client relationships and deep sector experience. For example, we now have a fantastic financial services team in the Americas through two acquisitions, allowing us to serve leading brands on an international basis.”

Shury from IFF Research homes in on the launch of its new energy and environment sector offering. “Rarely has there been a more important time for insight to inform energy and environmental policy decisions, or to influence behaviour change,” he remarks. “While we already supported several clients with sustainability research, we believe this focus will enable us to have a greater impact on policy change and support sustainable business across the UK.”

For MMR, the main diversification areas have been brand building and consultancy via sister agency Huxly. Such a strategy “helps clients to identify innovation opportunities and bring them to life through enhanced consumption experiences. It’s brand consultancy with a sensory lens,” is how Lintern terms the approach.

Looking back at the past year, the agencies' overall take is one of optimism: "Following a very challenging first half in 2020, we have had an amazing 18 months," asserts Perowne at Savanta. "The business is more than two-thirds larger than before the pandemic and that is testament to the brilliant work of our exceptional team and [how well they have] delivered to our clients."

MMR's Lintern describes the past 12 months as being "better than the middle of 2020 and quite buoyant in terms of number of projects". However, he does call attention to a "definite downward pressure on price and time, coupled with a desire for more innovative ways of connecting with consumers".

DJS, Ipsos and IFF all mention one vital issue that is currently having a major impact on the business climate within the insights industry: recruitment. "Resourcing within growing agencies has always been an issue," acknowledges Sims. "There is a shortage of talent and this is something that we are looking to address by taking on greater volumes of people at entry level and then putting in place training and development plans to secure them for the long-term."

"Business conditions are good in the main, but some of the most significant challenges relate to technology and people," agrees Beaver at Ipsos. "The labour market is very active at the moment and finding the right talent, at pace, is one of our greatest challenges as we continue to grow," she adds.

Over at IFF, Shury also points to an extreme talent shortage. "We know we're not alone in struggling to fill roles at all levels having experienced a higher-than-normal employee turnover in 2021. With continued ambitions for growth and a commitment to delivery, the challenge we face is supporting our existing team through these busy times."

Leaving ongoing hiring woes aside, most of the agencies have taken on board new expertise over the course of the last year.

Perowne at Savanta relates his agency's experience in this regard: "Our acquisition of YouthSight has been transformative in the youth and higher education sectors. Not only has it added the UK's largest youth panel to our growing audience access capability, but it has also meant that we now have unrivalled knowledge of young people within the business."

DJS has also been busy bringing in new talent: "This has ranged from people with specific sector experience, such as culture and employee engagement, through to those with technical skills like programming, panel management and UX," reports Sims.

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**"THE LABOUR MARKET IS VERY ACTIVE AT THE MOMENT AND FINDING THE RIGHT TALENT, AT PACE, IS ONE OF OUR GREATEST CHALLENGES AS WE CONTINUE TO GROW."**

KELLY BEAVER, IPSOS MORI

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### **“THE INDUSTRY WILL BEST SERVE ITS CLIENTS THROUGH A BALANCED INVESTMENT IN ROBUST DATA, EXCEPTIONAL TALENT AND IMPACTFUL TECHNOLOGY.”**

ROGER PEROWNE, SAVANTA

At IFF, the agency is currently recruiting for a talent acquisition partner. “We’ve expanded our housing team, which delivers policy work for clients like Ministry of Housing, Communities and Local Government, as well as customer insight work for a wide range of social housing providers. We’ve also added to our team of individuals who specialise in research in social care, meeting a growing demand for our services in this complex policy environment,” notes Shury.

Despite supply chain issues, a squeeze on budgets as a knock-on effect of Covid-19 and tighter turnaround times being demanded by clients, the agencies still believe that the market research sector will flourish in 2022. “The agencies who can bring a strong understanding of the client’s environment, be timely and contextualise and future-proof the insights they are providing to clients will thrive,” observes Beaver at Ipsos.

Over at Savanta, Perowne has this to say: “The industry will best serve its clients through a balanced investment in robust data, exceptional talent and impactful technology.”

MMR’s Lintern has his own take on the outlook for 2022: “I think we’ll see a subtle shift from agile being the shiny new thing, to agile and tech-enabled approaches combining with intelligent AI and human analysis. This will allow consumer input into a wider range of decision-making, but in a more advanced, more thought-provoking, creative and useful way.”

Sims at DJS says he believes that prior to the pandemic a lot of growth areas were around technology, something that will continue in his opinion, albeit with a new twist. “Areas like UX will continue to grow, driven by the acceleration of the digital world. Equally, it feels like we are starting to see a resurgence of the ‘old-fashioned’ methods – computer-assisted telephone interviewing and face-to-face interviews, talking to people, having a break from a screen.”

He continues: “Employee engagement is likely to be a big area as employers grapple with new ways of working and supporting staff wellbeing. More generally, business-to-business research is likely to be big as companies try to adapt to changes in supply chains and trading conditions.”

IFF’s Shury sums it up neatly when he says: “Our sector has a role and a purpose that perfectly chimes with the key issues of our times – we provide data and insights to help people make better decisions in a rapidly changing world. The companies that will flourish most will be those whose purpose and culture best supports its team through the pressures of the post-pandemic world and does so in an authentically inclusive manner.”

# This year MRS celebrated 42 Research Heroes



Chosen by you for going beyond  
the day job to champion and  
support their colleagues and  
businesses in difficult times.

Read all of their stories at  
[research-live.com/heroes](https://research-live.com/heroes)

In Spring 2022, MRS will be requesting  
nominations for Research Heroes 2022.



# INCLUSION AND SUSTAINABILITY: WHAT YOUR COMPANY CAN DO TO HELP

*By Judith Staig, writer and researcher, contentwrite.com*



Sometimes, when we are faced with world-sized problems, such as discrimination or climate change, we can feel helpless or overwhelmed. We want things to be different, but we don't know what we can do to effect change.

The MRS Inclusion and Net Zero pledges were created out of a desire to address exactly this issue. Both pledges offer those who sign up practical, actionable steps that they can take to be part of the solution.

## INCLUSION AND SUSTAINABILITY: WHAT YOUR COMPANY CAN DO TO HELP

### THE MRS INCLUSION PLEDGE

With approximately 60 signatories to date, the Inclusion Pledge is a success story for the MRS and the Diversity, Inclusion and Equality (DI&E) Council. Created in 2018, the pledge asks CEOs to make five commitments towards creating safer and more representative workplaces, including publishing pay statistics annually, working towards government targets for women and ethnic minorities at board level, and improving recruitment practices.

One of the earliest signatories to the pledge, Rebecca Cole, MD of Cobalt Sky and MRS Main Board member says, “When I first came across the pledge, I wanted to sign up straight away. My main driver was internal; we have a diverse workforce and inclusivity is very important. What was so appealing about the Pledge was the strong, actionable pillars. It was a message to our employees to say that we are genuinely committed to doing something about this issue.”

As a relatively small company (with 18 employees) there were some challenges for Cobalt Sky in signing up. For example, it is easier for a large company to publish meaningful averages of pay statistics split by key demographics, purely because the sample sizes are bigger. Rebecca and her team had to work out how best to do this in their organisation. They also conducted a survey of all of their employees, not only to understand if they feel included, but to find out more broadly about employee satisfaction and wellbeing, and to gather suggestions about how to improve. To do this anonymously, they had to compromise on collecting some demographic data as it may have been identifying. Rebecca is keen to stress that none of these challenges were insurmountable and that the pledge is suitable for all organisations, of any size.

On a personal level, Cole says, “I am particularly passionate about gender equality. In our industry, people don’t think there is a problem but I’ve been assumed to be my male employee’s secretary; I’ve been in meetings where people will only talk to my male chairman. I think we have made great strides, but we are still miles off on gender.”

As more companies sign up to the pledge, we can hope to see progress on gender, as well as on all other aspects of diversity and inclusion. Nicole Duckworth, UK MD at PRS in Vivo, is one of the most recent signatories to the pledge. She says, “I’m a huge advocate of giving everyone opportunities to achieve their potential and I want to work in an environment where everyone is valued for the skills that they bring.” The company has signed up to the pledge as part of a rebranding and restructuring initiative which also involves becoming a B Corporation. Duckworth says their desire is to “make our societal contribution as important as our economic mission.”

## INCLUSION AND SUSTAINABILITY: WHAT YOUR COMPANY CAN DO TO HELP

To live up to the promises of the Pledge, Duckworth and her team will focus on a number of areas, including:

- reviewing the recruitment process to ensure the team is comprised of a range of people from diverse backgrounds with diverse skills and perspectives
- reviewing packages and benefits to include things that people really value and care about
- ensuring the on-boarding process is welcoming and accessible to everybody, creating a sense of comfort and belonging from day one
- focusing on learning, development and growth so that people can flourish, whatever their background
- sharing knowledge and providing access to opportunities to aid development.

Some of the practical things that the company already does include offering employees opportunities to travel and experience different cultures, training and support around mental health, providing an ongoing calendar of events around diversity and inclusion and giving people paid time off for voluntary work. This approach emphasises how a focus on inclusion creates a positive work culture for everyone. Duckworth says, “Our people tell me they appreciate being in an environment where they are supported, nurtured and challenged. They are welcoming of the fact that diversity of thinking is encouraged and constructive challenge is embraced.”

The final word on the Inclusion Pledge comes from Rebecca Cole. She says, “It is a living thing. We are making sure the pledge is something that everybody feels like they own. It may be one person’s signature on it, but it belongs to the whole company.”

Find out more about [signing up to the MRS Inclusion Pledge](#).

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**“OUR PEOPLE TELL ME THEY APPRECIATE BEING IN AN ENVIRONMENT WHERE THEY ARE SUPPORTED, NURTURED AND CHALLENGED. THEY ARE WELCOMING OF THE FACT THAT DIVERSITY OF THINKING IS ENCOURAGED AND CONSTRUCTIVE CHALLENGE IS EMBRACED.”**

NICOLE DUCKWORTH, PRS IN VIVO

## INCLUSION AND SUSTAINABILITY: WHAT YOUR COMPANY CAN DO TO HELP

### THE MRS NET ZERO PLEDGE

Steve Phillips, CEO of Zappi and chair of the MRS Sustainability Council, says the idea of creating a council came during a conversation about the success of the MRS' inclusion initiatives. Why not use the same approach to increase the conversation in the industry around climate change?

He has found widespread support for the idea. Research leaders often have a personal interest in sustainability and some say they are being held accountable by their children for working to combat climate change. And if their children aren't putting on the pressure, then their employees certainly are. The idea makes good business sense too: issues such as diversity and sustainability are becoming increasingly important when people evaluate potential employers, and some clients are starting to question sustainability policies when awarding work.

The MRS Sustainability Council was established in 2020 and the Net Zero Pledge was launched in June of 2021. The timing couldn't have been better. Not only is climate change widely seen as one of the most pressing global issues but, as a result of the pandemic, we have all been forced to think differently about how we work. It seems likely that some of the changes that we have been obliged to make will stick. We've learnt that even if we can't travel to be together, the work can still get done very effectively online. This is important because, for many research companies, travel will be one of the biggest contributors to carbon emissions.

The Net Zero Pledge asks signatories to commit to making their businesses net zero by 2026. Phillips says the research leaders he has spoken to all want to sign up, but some are concerned about the time, skills and budget that might be needed. That is why the main aim of the pledge is to make it quick, easy and cheap to do. As an industry, our emissions are comparatively low – market research companies don't tend to run factories or fleets of lorries – so we can afford to be ambitious. Whereas the UK has pledged to achieve net zero by 2050, we've given ourselves only five years.

Phillips doesn't just think that this is achievable, he knows that it is: Zappi is already at net zero, as part of working towards becoming a [B Corporation](#). As part of the process, he and his team evaluated carbon footprint calculators and, although the pledge does not mandate the process that signatories use, the MRS has partnered with the provider they identified to make a calculator available at a reduced cost – and free for smaller businesses.<sup>1</sup>

For anyone who is unsure about how to get all of this right, Phillips wants to emphasise that the important thing is just to get started. He says, "My view is 'progress over perfection'. Over the next five years we have to be able to calculate and offset our emissions better. In year one you don't need the perfect calculation and you don't need the perfect offsetting, but let's start the journey, then let's communicate."

## INCLUSION AND SUSTAINABILITY: WHAT YOUR COMPANY CAN DO TO HELP

His view is echoed by one of the earliest signatories to the pledge, Caroline Wren, MD of MTM. As someone who became interested in sustainability early in life – when aged five she was encouraged by her family to write a letter of support to an environmental activist who was in prison in Japan – she was excited to sign up. She says, “It’s fantastic when an industry body takes the lead and raises the profile of an issue like this... I think it’s important to normalise the fact that we do all need to change. I was keen to take part and it took no time at all to get agreement from my board.”

MTM is at the beginning of the net zero journey and Wren is happy to share their process and progress so far, in order to encourage and inspire others. They’ve taken a practical approach, assembled a team of ‘Net Zero Heroes’ and started to break down what could be an overwhelming task into manageable chunks, looking at both areas where they can reduce emissions and also how they can offset when travel is essential.

Caroline’s top tips for anyone considering signing up to the pledge are as follows:

- Definitely sign up – just do it – it will be easier and more rewarding than you think.
- Make sure you have your FD on board; there will need to be some budget available, especially for the offsetting element.
- Don’t panic, take your time to make a plan and don’t expect to fix everything overnight.
- Break it down into manageable chunks and assign champions for each element – the momentum will grow within the business and employees will be excited about taking part.

Both Wren and Phillips are clear that the pledge is only the beginning. Phillips says, “We called it the Net Zero Pledge rather than the Sustainability Pledge because we knew we were only tackling one part of the issue. There are other things we need to work on such as recycling, bringing clients on board and being a voice for the consumer for their issues around sustainability. We know we have a long way to go, but we wanted to make it really easy for people to join in and then create a movement around where we go next.”

Find out more about [signing up to the Net Zero Pledge](#).

<sup>1</sup> More information is available here: [Register with Compare Your Footprint – Carbon Footprint Calculator and Benchmarking for organisations](#)

# THE CLIENT PERSPECTIVE

*Katie McQuater, editor,  
Research Live & Impact magazine*



Research agency performance hinges on the success of client partners, and the past year has continued to be challenging for client organisations across sectors. Adapting to and understanding people's new contexts has continued to be key during 2021, with insight professionals turning to existing, trusted methods and partners, as well as trying novel approaches.

### **For the BBC, Covid-19 prompted an increased focus on understanding media habits, according to Nick North, the broadcaster's director of audiences.**

"People's lives and daily routines have been turned upside down over the last 18 months. Tracking how the crisis has changed people's media consumption has been an essential input into countless strategic and editorial decisions across the BBC, whether that's changes to radio scheduling as 'drive time' disappeared for many, or the prime time scheduling of restorative TV shows such as Repair Shop, or how effectively vital public health messages are getting through to people," says North. "We've been fortunate that many of our media measurement systems continued to function throughout, giving us a unique insight into people's lives during the pandemic."

Innovation and resourcefulness have been key for insight teams in the past year as they looked to continue their position as advisers to the business.

For example, customer advisory boards have allowed Jaguar Land Rover to stay connected to its customers, says global customer insight director Joanne Pearson. The company also set up online communities and conducted qualitative research online to deliver global projects without the need to travel overseas. Key to this, says Pearson, was "having a skilled, resilient and adaptable team who could still be incredibly effective despite multiple resource constraints and challenges".

Similarly, for Aviva, the company's customer panel has been "invaluable" in 2021, according to Rhea Fox, head of marketing, general insurance, to help it "monitor customer sentiment on an ongoing basis and provide low-cost overflow to ad-hoc requests".

Resourcefulness was also a theme for the Football Association (FA). For Ross Antrobus, head of behavioural insight and analytics, success has meant being able to do more with less. He says: "Decreased budget and resource have made us get more from our existing tools and secondary data and also made our stakeholders more engaged (in some cases) when spending cash, as there are more eyes on return on investment and ensuring spend is evidence based."

### **"DECREASED BUDGET AND RESOURCE HAVE MADE US GET MORE FROM OUR EXISTING TOOLS AND SECONDARY DATA."**

ROSS ANTROBUS, FOOTBALL ASSOCIATION

Faster, more agile working methods have also been key for the FA, notes Antrobus: “75% of an answer to a business challenge delivered at the right time is better than a 100% of the answer late.”

Carlsberg has continued its work to build new capabilities in the past year, with a particular focus on its insights data ecosystem. Global insights and analytics director Jenny Syddall explains: “We have focused a considerable amount of effort on data governance, aligning our senior management on how we structure our data and how it should be used.”

The brewer then designed platforms to allow those internally to access data and information in a user-friendly format. “We have spent an equal amount of effort on the look and feel of these tools as on the data governance, as we wanted to make them as intuitive as possible for our users,” says Syddall.

For toy company Mattel, in-the-moment research was key to staying on top of a changing environment for its customers. The business has tried new research approaches as it looked to better cover the different situations people found themselves in.

Michael Swaisland, head of insights and analytics EMEA, says: “Greater user-led video engagement has been a key new pillar – whether that is video-based work with parents to understand how they and their kids are coping in the new unknown of being full-term workers and carers for their kids, or getting candid responses from kids on topics important to them.”

Heading into 2022, Swaisland says the emphasis is less on obtaining more data and information and more on “finding better ways to use and overlay what we have to tell richer stories and aid smarter commercial decisions.”

### LOOKING AHEAD

An even greater focus on quantifying and understanding commercial value will be key in the year to come, says the FA’s Antrobus. “With internal return on investment demands on marketing spend, the same can be said for our commercial partners. For some, ‘traditional’ media valuation is not enough to ‘move to dial’ internally – continuing to develop how we demonstrate tangible value for our partners has been key over the last two seasons.”

Antrobus also wants to focus more on ‘fast qual’ and will need methods that can support this. “We’ve developed a few tools that enable us to do quant validation very quickly, however this is often the final step in a more detailed project to provide internal stakeholders with a few percentages to help support internal sign off. Looking ahead, we will need methods that can aid development of ideas and creative concepts with much the same speed.”

To get noticed by clients, agencies must focus on the business problem they can answer, not on highlighting their methodologies, adds Antrobus. “We want insightful, decision-ready findings that drive our business forward. I’m far less interested in the ‘how’ behind the ‘what’.”

For Mattel’s Swaisland, research agencies also need to do more to stand out for their thinking rather than focusing on procedure.

“There are so many tools and processes that very few are truly revolutionary or unique anymore. But what does stand out are smart individuals, clever means of storytelling and inventive ways that challenge us to look at things differently,” says Swaisland. “Agencies need to, more than ever, have strong opinions. Insights functions are not about information delivery anymore – they are here to foster mindset changes, provoke new ideas or ways of doing things and keep the business just a little bit uncomfortable. We need agencies that aid that, not ‘yes’ people.”

As well as continuing to look towards the existing ‘big ticket services’ of measurement, analytics and better use of data – including its own data set – the BBC is also interested in new means of understanding audiences.

North says: “We’re always interested in new approaches to help us understand what drives people’s media choices, whether that’s choosing something on a smart TV or their choice of news app. And we’re looking to draw on specialists’ knowledge to help us in the different nations and regions, and among our less well served audiences, to make sure we understand people’s tastes and behaviours across the whole UK.”

North believes there is currently a “hunger for insight” to help make sense of the world.

“Despite feeling locked-in and locked-down, in some ways there’s a greater readiness to engage with agencies, as we search for those ‘ah ha’ moments that help us understand how things have changed. I look forward to the return of more in-person thought leadership from research agencies, to make sure we’re getting the very best from our research roster,” he says. “We’re also so heavily invested in our own first-party data, we’ll always be interested in agencies that can offer ways to build on what we’ve got, enriching it in different ways, giving us lasting value.”

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## “AGENCIES NEED TO, MORE THAN EVER, HAVE STRONG OPINIONS.”

MICHAEL SWAISLAND, MATTEL

Aviva's Fox wants to focus more on bringing together different data sources in 2022. "Synthesis of sources across methods is something we need to work on within the team – both making time for it and doing it well – and is something agencies could do much better generally."

Range testing and pricing work, creative development and testing are core services Fox is looking towards in the next year. To be noticed by buyers of research, she says, agencies need to have "great case studies, demonstrating commerciality and impact".

After focusing on building its data ecosystem, Carlsberg is now turning its attention to embedding these tools. This will include making sure that output is "heavily linked" to standard business processes and helping teams to navigate different platforms and extract the insights they need, as well as understanding the limitations of data, explains Syddall.

The central team still has a key role supporting the company's brands globally, so 2022 will also be 'business as usual' in terms of Carlsberg's brand health tracker, concept development and product and advertising testing.

"In addition to this, we are focusing on how we can drive additional value to the business in terms of driving premiumisation, calculating return on investment and strengthening advertising execution in market," says Syddall.

Agencies can stand out to clients by thinking about how to make insights "work hard", according to Syddall, "whether that is by starting from knowledge already in the organisation, or making any data generated easily accessible, so that it can be used to support future analytics and business questions".

Carlsberg is conducting increasingly fewer primary research studies as it gets better at using its existing data sources. "To get on our radar, we need to see genuinely differentiated knowledge now," adds Syddall.

Jaguar Land Rover's Pearson says the company will continue to invest in its relationship with long-standing partners, but adds: "We're always on the lookout for new agency partners who can bring something different."

The influence of insight within the organisation will continue to grow in 2022, Pearson adds. "We are actively helping our organisation and colleagues to focus on customer centricity – to understand the changing attitudes, behaviours and needs of customers and prospects and the differences created by cultures, demographics and diverse audiences."

While it's been a challenging time for the research industry, the BBC's North is hopeful that next year will be better. He says: "I worry about the viability of some traditional research methods, given what the industry has been through during the pandemic, and with further pressure on some research budgets as more investment moves into data and analytics. It's a tough time. But I've got every confidence in the resilience and innovation of the research agencies with whom we work to see their way through this."

# MRS PRESIDENT'S MEDAL 2021

*An interview with Bath University's  
professor of criminology Yvonne Jewkes*



Professor Jewkes was awarded the MRS President's Medal 2021 for her work researching how prison design can rehabilitate rather than punish offenders.

## **YOU DESCRIBE HOW DESIGN CAN HELP TRANSFORM PRISON FROM BEING A PLACE OF PUNISHMENT TO A 'HEALING ENVIRONMENT' – WHAT DOES THAT MEAN?**

Despite all the damning research evidence of the harm prison does to some of society's most vulnerable members, there remains a pervasive assumption that prisons must feel like places of hardship and deprivation. Throughout my career, I've championed Maggie's Cancer Care Centres and encouraged prison architects to reflect on the values they incorporate which are summed up by their co-founder, Charles Jencks, as the 'architecture of hope'.

We owe it to victims of crime, and potential future victims, to do more than simply warehouse prisoners. Nearly all the people currently in prison will be released into society. I always say to doubters, who would you rather have living next door to you? Someone who has been treated with decency in an environment that has helped to heal them and instilled hope for their future? Or someone who has effectively been caged and brutalised for many years?

### WHAT EVIDENCE EXISTS FOR THE POSITIVE IMPACT OF PRISON DESIGN ON REHABILITATION?

My research has found numerous examples of positive impacts of prison design, but another way of conceptualising it is to look at reoffending rates. In the UK nearly 50% of people who have been to prison go on to reoffend (and in some prisons, it's as high as 75–80%). In, for example, Norway, which is recognised internationally for the imaginative, humane architecture of prisons such as Halden, recidivism is 22–25%.

### HOW RECEPTIVE ARE PRISONERS AND PRISON STAFF TO BEING INTERVIEWED? WHAT KEY QUALITIES MAKE FOR A GREAT PRISON RESEARCHER?

Most prisoners are receptive because they like to take part in research – and it's a break in the routine, a different face, someone who's interested in them and their stories. Staff are often under time pressure but they usually find it an enjoyable experience. Key qualities – patience, empathy, humanity.

### YOU'VE WRITTEN ABOUT THE VALUE OF COMMUNICATING EMOTION IN PRISON RESEARCH – DOES IT RISK LOOKING LESS 'SCIENTIFIC' AS A RESULT, ESPECIALLY IN THIS AGE OF BIG DATA?

My research isn't about 'science' or 'big data'. It's about human beings trying to survive in difficult circumstances and soul-deadening environments. Writing about the emotional texture of any research inquiry requires nuanced thinking and careful writing, but it's impossible to ignore that the themes underpinning my work – authority, power, guilt, injustice, violence, pain, anger, sadness and shame – deal with emotions in their starkest form, and I see it as my role to represent these aspects of life in confinement.

### DOES GOOD DESIGN COST MORE – IS THIS A REAL BARRIER OR A PERCEIVED ONE?

Good design need cost no more than bad design.

### CAN YOU GIVE A PARTICULAR EXAMPLE OF AN INSIGHT EMANATING FROM YOUR RESEARCH THAT HAS HELPED CHANGE PREVIOUSLY INTRACTABLE OPINION REGARDING PRISON REFORM?

When I first presented my research to the UK Ministry of Justice, we had conversations about bars on windows. I was told that, while horizontal bars (permitting a better view) could be used on cell windows for women and children, it was important that vertical bars be used in men's prisons to signify punishment. I presented research evidence that showed the psychological and health benefits of views of green spaces, and this has driven a sea change in high-level thinking. The new prisons currently being built in this country will not have bars on the windows at all for the first time in English penal history.

### SOME YEARS AGO, YOU DESCRIBED THIS PERIOD AS A ONCE IN A LIFETIME OPPORTUNITY TO REPLACE DECAYING PRISONS AROUND THE WORLD WITH PRISONS DESIGNED FOR REHABILITATION. IS THIS HAPPENING?

Certainly not in England and Wales. We are heading in the wrong direction, building more and bigger prisons to hold ever greater numbers of people, many of whom could be more effectively dealt with outside the criminal justice system. Some of our neighbours are doing better. For example, Scotland abandoned plans to build a 300-bed women's prison (a large prison in the context of a female inmate population of 400) in favour of a 50-bed national facility and five 20-bed regional units.

### WHAT PROFESSIONAL ACHIEVEMENT ARE YOU MOST PROUD OF?

My involvement in the new women's prison in Limerick, Ireland. I'm hopeful that, when it opens in summer 2022, it will rival the best of Scandinavian facilities in being a beautiful, calm, creative place in which women can take control of their lives and build better futures. The current Limerick prison was described in a 2003 inspectorate report as deplorable. I was brought onto the project for its replacement at a time when the Irish Prison Service (IPS) had already started to draft plans for the new facility – a prison with a 'soft' edge but primarily a prison that had no architectural empathy with prisoners.

I encouraged them to be bigger and bolder in their ideas, to imagine what an architecture of hope might look like for women in Irish prisons. I persuaded IPS to hold a design competition, as was more common in parts of northern Europe. The winning design, by PJ Hegarty, is a radical departure and, unusually, was the second most expensive submission, underlining that design innovation, not cost, was prioritised. IPS's commitment indicates that Limerick is not simply a one-off experiment, but that through deep engagement with my research over an extended period, the IPS has come to view prisons as potentially transformative environments that can have positive impacts on the lives and futures of traumatised and criminalised women.

You can read more about it and see a three-minute video showing my input into the design of the new prison [here](#).

### HAS YOUR RESEARCH INTO THE IMPACT OF PENAL ARCHITECTURE CHANGED YOUR APPRECIATION OF ALL ARCHITECTURE? WHAT ARE YOUR FAVOURITE EXAMPLES OF ARCHITECTURE FROM OUTSIDE THE PENAL SYSTEM?

I love Art Deco buildings, whether houses, cinemas, factories like the Hoover Building in Ealing, London, or hospitals like the sanatorium in Paimio, Finland, designed by Alvar Aalto which had ocean liner glamour and was a Gesamtkunstwerk – a total work of art. Every detail from door handles to lighting to furniture was imagined and designed by Aalto and custom made to maximise patients' comfort and emotional wellbeing.

### WHAT'S YOUR DREAM PROJECT TO WORK ON?

Limerick was a dream job because of the generosity and faith IPS showed in me. But what I'd really like to see is: a radical reduction in prisoner numbers (most prison populations could be halved with no detrimental impact on crime rates); closure of ageing prisons that are no longer fit-for-purpose; and a halt on current building programmes that will warehouse people in prisons built to the same design as their 19th century predecessors. Then I'd like to be involved in the design of a small number of humane, progressive establishments, with an emphasis on meaningful work, training and education, as well as opportunities for arts and creative pursuits. I've just written a piece advocating the introduction of feminist values into the women's prison estate. I'd love to work on that project.

You can see all the winners and finalists of the MRS Awards 2021 [here](#).



# The Research Buyers Guide

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