THE RESEARCHLIVE INDUSTRY REPORT 2023

INCLUDING THE NEW MRS LEAGUE TABLES

VERVE

MRS Evidence Matters™

VERVE

Energising Insight

Energising our people...
to live and enjoy life with Verve

Energising our clients...
to create bolder insights
from more holistic thinking

Energising our industry...
to be more engaging and diverse
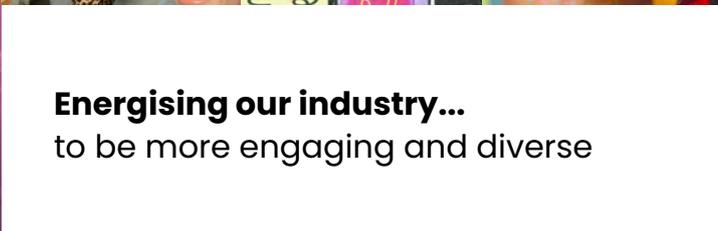
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We help clients respond to global change using our expertise in culture, communities and smart digital insight.

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CONTENTS

INTRODUCTION

Jane Frost, CBE, chief executive, MRS

Welcome to the Research Live Industry Report 2023

This report brings together multiple sources of intelligence. The MRS League Tables are built on 2021 financial data submitted and collected in 2022; the data is focused solely on UK-based turnover and international work managed and invoiced from the UK. Thank you to our sponsor Verve for supporting the Industry Report, an important healthcheck on the state of the research industry.

The numbers in the tables tell a complicated story of post Covid recovery among the top 100 individual agencies, from 0.8% growth in 2020 to 6.4% in 2021. The research industry is now worth over £8bn to the UK. That alone is a number worth celebrating. 2021-22 was a year of respite before a fresh slew of momentous events impacted the economic climate: the war in Ukraine; a fractious change of leadership in the UK Government; the first bite of recession and the unfolding cost of living crisis. This snatch of sunshine and new growth has been overshadowed once again by the dark clouds of uncertainty.

However, at the MRS Awards 2022 last December, I saw the sense of hope reflected in the eyes of more than 900 attendees who were eager to celebrate the excellent work of research; work which carries on, rain or shine, peace or war. Just read our interview with GAMAAN (page 45) – the winners of the MRS President's Medal – whose truly heroic work reveals what Iranians really think about the regime that governs them.

For a second year, the MRS League Tables highlight those companies who have signed up to the MRS Inclusion Pledge and the MRS Net Zero Pledge. My vision is to see growth coupled with commitment to social change. With more than 90 organisations signed up to the MRS Inclusion Pledge there is great momentum in this vision. However, as our reporting on the gender pay gap reveals (page 22) we cannot be complacent, and the business of research has much work to do to significantly shift the dial when it comes to building social value.

Looking to 2023, our new Business Sentiment Monitor predicts only 4% growth on average for supply side businesses (see page 42). We must all work together to protect this growth, small that it is, so as not to let clients and C suite lose sight of the value of research and insight; not as discretionary spend but as a critical strategic investment. That's why our visually arresting Research Inside campaign, which shares the latest award winning MRS case studies as widely as possible, is so important. Please use your voices and channels to help us amplify this message, and ensure that this sector is in the best possible shape to flourish when the clouds part again. It won't be long.

Jane Frost

Jane Frost, CBE, chief executive, MRS

Pledge to make a difference in 2023

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.

Manifesto for Opportunity

MRS Inclusion Pledge

The Inclusion pledge has been signed by:

7th Sense Research UK
2CV
Ardent Fieldwork
AudienceNet
Basis
Bayes Price
BEAM Fieldwork
Behaviorally (Formerly PRS)
Big Sofa
Bilendi & respondi
Blue Yonder
BMG
Boxclever
BritainThinks
buzzback
BVA BDRC Group
C Space
Cint
Clearview Research
Cobalt Sky
Cognisant Research
Crowd DNA
delineate
Differentology

Discovery Research
DJS Research
Dynata
Edelman Data & Intelligence
Empower Translate
England Marketing
Firefish
FlexMR
GfK
Glow UK Hub Ltd
Hannelius Recruitment
Hall & Partners
IFF Research
Ipsos
i-view London
Jigsaw Research
Kadence
Kantar
Kantar Profiles Network
Kantar Worldpanel
Launchpad Research
LDA Research
Measure Protocol
MESH

MIS Group
MM-Eye
Morris, Hargreaves, McIntyre
Motif
mTab
MTM
NatCen
Ninth Seat
Norstat UK Ltd
Northstar
Opinium
OnePoll
Oxygen Brand Consulting
Panelbase & DRG
pplinsights
PRS IN VIVO
QRi Consulting
Quadrangle
RED C
Ronin
Savanta Global
Savanta UK
Savanta Americas
Strive Insight Limited

Shift Insight
Solutions Research
Simpson Carpenter Ltd
The Future Laboratory
The Nursery
The Survey Initiative
The Young Foundation
thisisthegoodside
Toluna
Traverse
Truth
Vela
Verve
Walnut Unlimited Walr
Watermelon
Yonder
YouGov
Zappi

Find out why leaders have signed their organisations up to the Pledge mrs.org.uk/inclusionpledge

MRS™

NOW'S THE TIME TO ENERGISE OUR PEOPLE, CLIENTS AND INDUSTRY

Paul Lawson, executive director, Verve

It's almost facetious to say we're living in challenging times. We have rarely seen a more uncertain outlook as the one in front of us heading into 2023. So, what should we be doing as an industry to help the businesses we work in and for, succeed over the coming years?

One commonly made argument in tough times is that the businesses that succeed will be those that talk to their customers more. It's an argument that seems to hold weight, with the most recent example being Covid where, despite never-before-seen disruption, the market research sector continued to grow.

VERVE

However, we cannot rest on our laurels. Now is the time for market research agencies and client-side researchers to face into the challenges that are coming, and these challenges come from inside our sector, as well as from the obvious external factors.

Here are three things that should be front and centre of our collective efforts in 2023.

MAKING MARKET RESEARCH A CAREER OF CHOICE FOR NEW JOINERS AND SEASONED EXPERTS ALIKE (ENERGISING OUR PEOPLE)

With 'the great resignation' and 'quiet quitting' casting a shadow over modern working we think there's a great opportunity to make market research an aspiration, not just a choice. For us at Verve it is about energising our people. That means:

– Enabling great talent to work from wherever they are. If people have the talent, passion, experience let's not make geography a determinant of whether they work with us

– Adapting working models to ensure the best people can work with us on their terms. This isn't just about remote, hybrid or reduced hours schemes. It's about establishing where there is mutual value and then working with individuals to create scenarios that fit their individual circumstances

– Investing in training while giving our young generation all the exposure, opportunity, and responsibility they need to succeed. Training should be the bedrock of how we develop people, but we also need to proactively look for opportunities to stretch our talent. Our newer generation should also lead the way in terms of engaging younger people in research.

OUR NEWER GENERATION SHOULD ALSO LEAD THE WAY IN TERMS OF ENGAGING YOUNGER PEOPLE IN RESEARCH.

HELPING OUR CLIENTS DELIVER BOLDER, BREAKTHROUGH INSIGHT (ENERGISING OUR CLIENTS)

We spend a lot of time as an industry talking about activation. While methods of communication are hugely important, we also think our insight needs to be bolder – impossible to ignore. For us this is about:

– **Research that draws on more data.** The amount of data we have access to grows every day. It's our job to be able to understand how we can get to it and how we should use it. We need to trust established methods, while being obsessively open to new ideas. We then need to bring it all together, creating projects that learn from social and cultural cues, primary research, transactional data, and unstructured feedback, in an integrated way

– **Creating insight ecosystems.** We should all be thinking about how individual insight programmes (and the agencies who run them) interact with and benefit one another. Insight communities (a favourite of ours so we had to get it in somewhere) and CX programmes are a perfect example, where an integrated approach is greater than the sum of the parts

– **Working smarter not (always) harder.** Budget challenges mean it is more important than ever for us to make sure we're investing our time and our clients' money in the right places.

HELPING OUR INDUSTRY THRIVE (ENERGISING OUR INDUSTRY)

Having just gone through a period of huge disruption and change we know that our industry, and the people in it, are ready for the challenges ahead. We think it's important we face into (run towards?) these challenges. Here are few that stand out to us:

– **Getting the foundations right.** Our work lives or dies on the quality of the people we talk to – we need to be more concerned than ever with making sure our research is speaking to the right people

– **Helping our clients see round corners.** Innovation will be hugely important over the coming years. We need to be ready to help our clients answer the tough questions – what's 'the future of...'

– **Standing up for the multitude of ways we add value.** Whether it's identifying emerging trends, getting the customer voice in the room for even the tightest of turnarounds, or developing new ways of interpreting big data, we need to be known as the way that businesses connect with their customers.

We know that disruption and change is coming, and we know that not all of it will feel positive in the short term. At the same time, we're excited to be part of an industry that thrives on change and look forward to working with our clients.

HIGHLIGHTS FROM THIS REPORT

8bn
+13.4% ON 2020
THE VALUE OF THE UK RESEARCH, INSIGHT AND ANALYTICS INDUSTRY*

£4.452bn
TURNOVER OF TOP 100 INDIVIDUAL AGENCIES VERSUS £4.1BN GENERATED IN 2020

6.4%
GROWTH YEAR-ON-YEAR FOR TOP 100 INDIVIDUAL AGENCIES. UP FROM 0.8% IN 2020

14.34%
GENDER PAY GAP IN UK RESEARCH COMPANIES, VERSUS THE NATIONAL AVERAGE OF +14.9%

+4%
THE AVERAGE REVENUE GROWTH ANTICIPATED BY RESEARCH BUSINESS OWNERS IN 2023**

40%
OF EUROPEAN RESEARCH OUTPUT IS GENERATED IN THE UK

* Research Live Industry Report 2021
** MRS Business Sentiment Monitor

MRS LEAGUE TABLES
ANALYSIS

David Barr, league tables compiler

In 2021, the top 100 individual agencies generated total turnover of £4.452bn. Overall year-on-year growth within these 100 agencies was 6.4%.

2021 can reasonably be described as a year of recovery following the setbacks of 2020 arising from the Covid pandemic (although a few agencies thrived in 2020 from special government-sponsored projects). 75% of agencies reported growth of turnover in 2021, and of these 48 recorded double-digit growth. Resilience is much in evidence and will be needed again in 2022 and beyond, as much of the developed world heads into challenging economic conditions, including recession in some important markets.

TOTAL TURNOVER AND GROWTH RATES OF TOP 100 INDIVIDUAL AGENCIES

	2016	2017	2018	2019	2020	2021
TOTAL TURNOVER	£3.026bn	£3.295bn	£3.627bn	£3.756bn	£4.076bn	£4.452bn
GROWTH RATE	2.8%	6.5%	3.9%	4.8%	0.8%	6.4%

NUMBER OF TOP 100 INDIVIDUAL AGENCIES WITH GROWING/DECLINING TURNOVER

	2016	2017	2018	2019	2020	2021
GROWING TURNOVER	67	64	57	66	46	75
DECLINING TURNOVER	33	36	43	34	54	25

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: 26; USA: 17; France: 2; Others: 5 (one each from Germany, Belgium, Netherlands, Norway, Japan).

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 email to the league tables compiler, David Barr, via industry.statistics@mrs.org.uk

MRS LEAGUE TABLES
TOP 100 INDIVIDUAL AGENCIES RANKED BY TURNOVER

2021 MRS LEAGUE TABLES, COMPILED NOVEMBER 2022

2021 RANKING NUMBER	CHANGE ON PREVIOUS RANKING	2020 RANKING NUMBER	COMPANY NAME	2021 (£M.)	2020 (£M.)	2019 (£M.)	% CHANGE ON PREVIOUS YEAR	GROWTH RANKING	MRS PLEDGES NET ZERO	INCLUSION
1	=	1	Kantar	469.510	432.129	462.211	8.650%	51		●
2	=	2	Ipsos MORI	303.464	317.841	245.367	-4.523%	88	●	●
3	=	3	Gartner	288.679	283.950	349.778	1.665%	73		
4	▲	5	Wood Mackenzie	*240.100*	232.141	226.703	3.429%	67		
5	▼	4	Dunnhumby	*216.913*	*249.643*	*260.551*	-13.111%	95		
6	=	6	GlobalData	189.300	178.400	178.195	6.110%	54		
7	=	7	Euromonitor	148.120	151.129	140.730	-1.991%	81		
8	=	8	Mintel	138.214	131.886	128.340	4.798%	59		
9	=	9	CACI	119.531	119.933	111.723	-0.335%	76		
10	=	10	Verint Systems	114.155	116.335	105.195	-1.874%	80		
11	▲	13	NielsenIQ	*95.750*	100.206	108.532	-4.447%	87		
12	▲	19	Information Resources	92.963	59.918	52.346	55.150%	6		
13	▲	17	GfK	92.822	77.106	83.263	20.382%	26	●	●
14	▼	12	Forrester Research	88.213	79.075	74.958	11.556%	45		
15	--	--	FastMarkets	85.400	83.700	89.900	2.031%	71		
16	▼	11	IQVIA	*83.537*	74.525	68.118	12.093%	43		
17	▼	14	Nice Systems	83.511	69.699	72.456	19.817%	27		
18	▼	16	Dynata Global	67.535	64.518	66.176	4.676%	61		●
19	▼	18	Ebiquity	63.091	55.907	68.133	12.850%	39		
20	▲	22	Teradata	59.623	48.346	48.037	23.326%	19		
21	▼	20	IDC	53.560	50.940	47.688	5.143%	56		
22	▲	25	Evaluate	53.490	41.792	30.892	27.991%	14		
23	▼	21	YouGov	52.100	47.200	41.200	10.381%	47	●	●
24	▼	23	The Research Partnership	45.136	40.297	33.248	12.008%	44		
25	▲	26	NatCen	41.414	32.755	34.872	26.436%	16		●

Those in *italics* are estimated or partially estimated figures

Those marked '--' are new entrants

2021 MRS LEAGUE TABLES, COMPILED NOVEMBER 2022

2021 RANKING NUMBER	CHANGE ON PREVIOUS RANKING	2020 RANKING NUMBER	COMPANY NAME	2021 (£M.)	2020 (£M.)	2019 (£M.)	% CHANGE ON PREVIOUS YEAR	GROWTH RANKING	MRS PLEDGES NET ZERO	INCLUSION
26	--	--	CRU International	40.946	36.091	36.001	13.452%	37		
27	▼	24	WGSN	40.709	39.392	39.608	3.343%	68		
28	=	28	Medallia	39.688	29.876	27.344	32.842%	9		
29	▼	15	OMDIA	33.957	34.711	53.287	-2.172%	82		
30	▲	40	Prescient Healthcare	31.467	25.527	18.808	23.269%	20		
31	▲	44	Quantexa	30.307	17.545	10.238	72.739%	2		
32	▼	31	Savanta	29.938	25.681	18.701	16.576%	32	●	●
33	▼	32	Toluna	27.955	24.310	25.654	14.994%	36		●
34	▼	33	Cello Health Insight	*26.850*	25.558	24.059	5.055%	57		
35	▲	36	WorldOne Research	26.497	21.309	16.485	24.347%	18		
36	▲	56	Edge By Ascential	26.458	25.864	16.665	2.297%	70		
37	▲	50	Kynetec	26.242	15.992	16.237	64.095%	3		
38	▲	45	Yonder Consulting	25.326	25.983	21.923	-2.529%	83	●	●
39	▼	29	Hall & Partners	*24.950*	21.562	29.531	15.713%	33		●
40	▼	35	Sprinklr	23.806	21.471	19.390	10.875%	46		
41	=	41	The Gallup Organisation	23.722	19.395	19.106	22.310%	23		
42	=	42	Basis Research	22.598	18.595	13.407	21.527%	24		●
43	▼	39	Frost & Sullivan	*20.525*	20.465	22.473	0.293%	75		
44	▲	46	Forsta Worldwide	*19.950*	16.784	17.527	18.863%	30		
45	▼	27	Black Swan Data	*18.475*	17.708	29.961	4.331%	62		
46	▼	43	IHS Markit Economics	18.450	18.237	19.385	1.168%	74		
47	▲	49	Concentra Analytics	17.362	16.007	13.412	8.465%	52		
48	▲	84	BMG Research	16.985	7.161	7.768	137.188%	1	●	●
49	▼	37	MMR Research Worldwide	16.798	20.589	17.808	-18.413%	99	●	
50	▲	55	Ipsos Interactive Services	16.475	13.933	13.368	18.244%	31	●	●

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51	--	--	Cint	16.350	14.824	13.373	10.294%	48		●
52	▼	48	MaritzCX	15.443	16.113	18.763	-4.158%	86		
53	▲	54	CSpace	15.287	13.942	17.707	9.647%	49		●
54	▼	52	Defaqto	15.250	14.557	13.818	4.761%	60		
55	▼	47	InSites Consulting	15.053	16.320	14.956	-7.763%	92	●	
56	▲	67	2CV	15.050	14.691	18.019	2.444%	69		●
57	--	--	Economist Intelligence Unit	15.016	14.758	16.337	1.748%	72		
58	▲	63	The Planning Shop International	14.255	13.386	12.764	6.492%	53		
59	▲	65	Harris Interactive	13.453	10.943	10.098	22.937%	22		
60	▼	34	Advertising Intelligence	12.646	13.381	11.945	-5.493%	90		
61	▼	53	IFF Research	12.624	13.953	9.230	-9.525%	94	●	●
62	▲	69	GWI GlobalWebIndex	12.292	9.270	8.754	32.600%	10		
63	▼	59	Incite Marketing Planning	12.120	12.439	11.781	-2.565%	84		
64	▼	61	PwC Research	11.755	12.255	12.655	-4.080%	85		
65	▼	57	B2B International	11.717	9.395	10.087	24.715%	17		
66	▼	58	Firefish	11.679	12.873	13.081	-9.275%	93	●	●
67	▼	62	Nielsen Book Services	11.650	11.855	12.255	-1.729%	79		
68	--	--	Zappistore	11.625	11.224	10.966	3.573%	65	●	●
69	--	--	Streetbees	11.576	7.073	4.709	63.665%	4		
70	▼	51	Walnut Unlimited	11.512	14.851	15.771	-22.483%	100	●	●
71	=	71	Adelphi International Research	10.700	10.329	9.429	3.592%	64		
72	▲	77	Sparkler-part of PA Consulting	10.678	8.440	9.900	26.517%	15		
73	▼	66	Behavioural Insights	10.602	10.094	9.848	5.033%	58		
74	▼	30	Nielsen Media Research	10.590	9.177	2.933	15.397%	35		
75	▼	60	Information Services Group	10.310	12.269	12.877	-15.967%	96		

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76	▼	68	Merkle Aquila Insight	*10.150*	9.808	11.177	3.487%	66		
77	▼	73	MetrixLab	10.140	9.023	9.454	12.379%	40		
78	▲	88	Simpson Carpenter	10.025	6.868	7.749	45.967%	7		●
79	▼	75	NPD Group	9.648	8.820	9.199	9.388%	50		
80	▼	78	BVA BDRC	9.594	8.068	13.461	18.914%	29	●	●
81	▲	92	Verve	9.470	7.230	5.869	30.982%	12		●
82	▲	85	Datamonitor	9.400	7.115	8.090	32.115%	11		
83	▼	79	Flamingo Research	9.125	9.865	8.218	-7.501%	91		
84	▲	87	Opinium Research	9.001	6.934	6.433	29.810%	13	●	●
85	▼	74	Shoppertrak	*8.500*	8.918	13.084	-4.687%	89		
86	▼	70	Nielsen Sports	8.479	7.557	9.169	12.201%	42		
87	▼	86	Trinity McQueen	7.849	6.985	6.985	12.369%	41		
88	▼	82	Springboard Research	7.819	7.388	6.342	5.834%	55		
89	--	--	MTM	7.512	6.101	5.275	23.127%	21	●	●
90	▲	93	Jigsaw Research	7.512	6.502	8.022	15.534%	34		●
91	--	--	Ronin International	7.440	4.775	5.743	55.812%	5		●
92	▲	94	DJS Research	7.100	6.291	5.161	12.860%	38	●	●
93	▲	99	The Nursery Research & Planning	6.842	5.718	6.456	19.657%	28	●	●
94	--	--	System 1 Research	6.707	5.570	6.272	20.413%	25		
95	--	--	Truth Consulting	6.690	4.638	8.903	44.243%	8		●
96	▼	76	Consulting at McCann Health	*6.511*	*7.792*	8.903	-16.440%	97		
97	▼	96	Promar International	6.320	6.092	6.301	3.743%	63		
98	▼	81	Kokoro	6.235	7.567	7.722	-17.603%	98		
99	▼	80	Tti Global Research	*6.050*	*6.130*	*7.769*	-1.305%	78		
100	▼	97	Nielsen Netratings	*6.025*	6.075	6.703	-0.823%	77		
TOTAL				**4451.944**	**4185.359**	**4177.274**				

Those in *italics* are estimated or partially estimated figures

Those marked '--' are new entrants

MRS LEAGUE TABLES
TOP 20 FASTEST-GROWING INDIVIDUAL AGENCIES

2021 MRS LEAGUE TABLES, COMPILED NOVEMBER 2022

2021 RANKING	GROWTH RATE	COMPANY NAME	2021 (£M.)	2020 (£M.)	MRS PLEDGES NET ZERO	INCLUSION
1	137.188%	BMG Research	16.985	7.161	●	●
2	72.739%	Quantexa	30.307	17.545		
3	64.095%	Kynetec	26.242	15.992		
4	63.665%	Streetbees	11.576	7.073		
5	55.812%	Ronin International	7.440	4.775		●
6	55.150%	Information Resources	92.963	59.918		
7	45.967%	Simpson Carpenter	10.025	6.868		●
8	44.243%	Truth Consulting	6.690	4.638		●
9	32.842%	Medallia	39.688	29.876		
10	32.600%	GWI GlobalWebIndex	12.292	9.270		
11	32.115%	Datamonitor	9.400	7.115		
12	30.982%	Verve	9.470	7.230		●
13	29.810%	Opinium Research	9.001	6.934	●	●
14	27.991%	Evaluate	53.490	41.792		
15	26.517%	Sparkler – Part of PA Consulting	10.678	8.440		
16	26.436%	NatCen	41.414	32.755		●
17	24.715%	B2B International	11.717	9.395		
18	24.347%	WorldOne Research	26.497	21.309		
19	23.326%	Teradata	59.623	48.346		
20	23.269%	Prescient Healthcare	31.467	25.527		

Those in *italics* are estimated or partially estimated figures

MRS LEAGUE TABLES
TOP 50 CONSOLIDATED BUSINESSES RANKED BY TURNOVER

2021 MRS LEAGUE TABLES, COMPILED NOVEMBER 2022

2021 RANKING NUMBER	CHANGE ON PREVIOUS RANKING	2020 RANKING NUMBER	COMPANY NAME	2021 (£M.)	2020 (£M.)	2019 (£M.)	% CHANGE ON PREVIOUS YEAR	GROWTH RANKING	MRS PLEDGES	
									NET ZERO	INCLUSION
1	=	1	Kantar	469.510	432.129	462.211	8.650%	27		●
2	=	2	Ipsos	329.595	341.045	265.488	-3.357%	48	●	●
3	=	3	Gartner	288.679	283.950	349.778	1.665%	41		
4	▲	5	Wood Mackenzie	240.100	232.141	226.703	3.429%	37		
5	▼	4	Dunnhumby	216.913	249.643	260.551	-13.111%	50		
6	=	6	GlobalData	189.300	178.400	178.195	6.110%	30		
7	=	7	Euromonitor	148.120	151.129	140.730	-1.991%	46		
8	=	8	Mintel	138.214	131.886	128.340	4.798%	32		
9	=	9	CACI	119.531	119.933	111.723	-0.335%	44		
10	=	10	Verint Systems	114.155	116.335	105.195	-1.874%	45		
11	▲	16	NielsenIQ	95.750	100.206	108.532	-4.447%	49		
12	▲	21	Information Resources	92.963	59.918	52.346	55.150%	3		
13	▲	19	GfK	92.822	77.106	83.263	20.382%	13	●	●
14	=	14	Forrester Research	88.213	79.075	74.958	11.556%	24		
15	--	--	Fastmarkets	85.400	83.700	89.900	2.031%	40		
16	▼	12	IQVIA	83.537	74.525	68.118	12.093%	22		
17	=	17	Nice Systems	83.511	69.699	72.456	19.817%	14		
18	▼	15	Omnicom/DAS	74.317	69.084	77.649	7.575%	29		
19	▼	18	Dynata Global	67.535	64.518	66.176	4.676%	33		●
20	▲	22	Ascential	67.167	65.256	56.273	2.928%	38		
21	▼	20	Ebiquity	63.091	55.907	68.133	12.850%	21		
22	▲	25	Teradata	59.623	48.346	48.047	23.326%	9		
23	=	23	IDC	53.560	50.940	47.688	5.143%	31		
24	▲	28	Evaluate	53.490	41.792	30.892	27.991%	5		
25	▼	24	YouGov	52.100	47.200	41.200	10.381%	26	●	●

Those in *italics* are estimated or partially estimated figures

Those marked '--' are new entrants

2021 MRS LEAGUE TABLES, COMPILED NOVEMBER 2022

2021 RANKING NUMBER	CHANGE ON PREVIOUS RANKING	2020 RANKING NUMBER	COMPANY NAME	2021 (£M.)	2020 (£M.)	2019 (£M.)	% CHANGE ON PREVIOUS YEAR	GROWTH RANKING	MRS PLEDGES NET ZERO	INCLUSION
26	▼	11	Nielsen Global Media	49.390	48.045	31.060	2.799%	39		
27	=	27	The Research Partnership	45.136	40.297	33.248	12.008%	23		
28	▼	13	Informa	43.357	41.826	61.377	3.660%	36		
29	▼	26	Cello Health	*41.900*	40.249	42.078	4.102%	35		
30	=	30	NatCen	41.414	32.755	34.872	26.436%	6		●
31	▼	29	Toluna Group	41.408	35.253	35.752	17.460%	17		●
32	--	--	CRU International	40.946	36.091	36.001	13.452%	20		
33	▼	32	Medallia	39.688	29.876	27.344	32.842%	4		
34	▲	42	Prescient Healthcare	31.467	25.527	18.808	23.269%	10		
35	▲	46	Quantexa	30.307	17.545	10.238	72.739%	1		
36	▼	34	Savanta	29.938	25.681	18.701	16.576%	18	●	●
37	=	37	WorldOne Research	26.497	21.309	16.485	24.347%	8		
38	--	--	Kynetec	26.242	15.992	16.237	64.095%	2		
39	▼	33	Yonder Consulting	25.326	25.983	21.923	-2.529%	47	●	●
40	▲	41	BVA BDRC Group	23.883	20.278	30.616	17.778%	16	●	●
41	▼	36	Sprinklr	23.806	21.471	19.390	10.875%	25		
42	▲	43	The Gallup Organisation	23.722	19.395	19.106	22.310%	11		
43	▲	44	Basis Research	22.598	18.595	13.407	21.527%	12		●
44	▼	35	Dentsu International	*21.867*	19.203	21.264	13.873%	19		
45	▼	40	Frost & Sullivan	*20.525*	20.465	22.473	0.293%	43		
46	▲	47	Forsta Worldwide	*19.950*	16.784	17.527	18.863%	15		
47	▼	31	Black Swan Data	*18.475*	17.708	29.961	4.331%	34		
48	▼	45	IHS Markit Economics	18.450	18.237	19.385	1.168%	42		
49	--	--	STRAT7 Group	18.023	14.326	14.116	25.806%	7		
50	=	50	Concentra Analytics	17.362	16.007	13.412	8.465%	28		

Those in *italics* are estimated or partially estimated figures

Those marked '--' are new entrants

MRS LEAGUE TABLES
TOP 20 FASTEST-GROWING BUSINESSES

2021 MRS LEAGUE TABLES, COMPILED NOVEMBER 2022

2021 RANKING	GROWTH RATE	COMPANY NAME	2021 (£M.)	2020 (£M.)	MRS PLEDGES NET ZERO	MRS PLEDGES INCLUSION
1	72.739%	Quantexa	30.307	17.545		
2	64.095%	Kynetec	26.242	15.992		
3	55.150%	Information Resources	92.963	59.918		
4	32.842%	Medallia	39.688	29.876		
5	27.991%	Evaluate	53.490	41.792		
6	26.436%	NatCen	41.414	32.755		●
7	25.806%	STRAT7 Group	18.023	14.326		
8	24.347%	WorldOne Research	26.497	21.309		
9	23.326%	Teradata	59.623	48.346		
10	23.269%	Prescient Healthcare	31.467	25.527		
11	22.310%	The Gallup Organisation	23.722	19.395		
12	21.527%	Basis Research	22.598	18.595		●
13	20.382%	GfK	92.822	77.106	●	●
14	19.817%	Nice Systems	83.511	69.699		
15	18.863%	Forsta Worldwide	*19.950*	16.784		
16	17.778%	BVA BDRC Group	23.883	20.278		
17	17.460%	Toluna Group	41.408	35.253		●
18	16.576%	Savanta	29.938	25.681	●	●
19	13.873%	Dentsu International	*21.867*	19.203		
20	13.452%	CRU International	40.946	36.091		

Those in *italics* are estimated or partially estimated figures

NOTES ON MRS LEAGUE TABLES

TOP 100 INDIVIDUAL AGENCIES

Entry 2: The 2020 result for Ipsos MORI was substantially boosted by inclusion of the React Study to examine COVID 19 infection rates. The study was commissioned by the Dept. of Health & Social Care. Without that exceptional project there is continuing underlying organic growth of turnover. The Ipsos MORI brand remained valid throughout 2021. In February 2022 Ipsos announced that the legacy brand name would cease to be used, and in future would be known simply as Ipsos. See also Entry 2 in the Notes for the Top 50 Consolidated Businesses.

Entry 27: WGSN is part of Ascential plc.

Entry 29: OMDIA is part of Informa plc. See also Entry 28 in the Notes on Top 50 Consolidated Businesses.

Entry 33: Toluna is part of Toluna Group. See also Entry 31 in Notes on Top 50 Consolidated Businesses.

Entry 34: Cello Health Insight is part of Cello Health. See also Entry 29 in Notes on Top 50 Consolidated Businesses.

Entry 36: Edge by Ascential is part of Ascential plc.

Entry 39: Hall & Partners is part of Omnicom/DAS.

Entry 48: BMG Research turnover for 2021 was substantially boosted by its involvement in the COVID 19 Test & Trace Programme.

Entry 49: MMR Research Worldwide is part of MMR Group which has worldwide turnover in excess of £45m. Information on turnover of other UK-based businesses within the group is not available.

Entry 52: MaritzCX is part of InMoment, a Utah-based customer feedback company.

Entry 53: CSpace is part of Interbrand Group within Omnicom/DAS.

Entry 56: 2CV now includes Breaking Blue Research, and was part of Cello Health during 2021. For subsequent developments, see also Entry 29 in Notes on Top 50 Consolidated Businesses.

Entry 57: The Economist Intelligence Unit is the research and analysis division of The Economist Group.

Entry 58: The Planning Shop International is part of Omnicom/DAS.

Entry 59: Harris Interactive is part of Toluna Group.

Entry 60: Advertising Intelligence is a subsidiary of Nielsen Media Research within Nielsen Global Media.

Entry 63: Incite Marketing Planning was acquired by STRAT7 in 2022 and became STRAT7 Incite. See also Entry 49 in Notes on Top 50 Consolidated Businesses.

Entry 65: B2B International is part of Dentsu International. See also Entry 44 in Notes on Top 50 Consolidated Businesses.

Entry 67: Nielsen Book Services is part of Nielsen Global Media.

Entry 71: Adelphi International Research is part of Omnicom/DAS.

Entry 73: Behavioural Insights – At the end of 2021, the UK government divested its one third equity stake in what was previously its 'nudge unit'. Behavioural Insights then became a wholly-owned subsidiary of NESTA, the UK-based innovation foundation.

Entry 74: Nielsen Media Research is part of Nielsen Global Media.

Entry 76: Merkle Aquila Insight is part of Dentsu International. In early 2021 Merkle announced its intention to 'retire' its Aquila analytics brand, in order to integrate its digital and customer analytics resource throughout the EMEA region. See also Entry 44 in Notes on Top 50 Consolidated Businesses.

Entry 77: MetrixLab is part of Macromill, a global online consumer insights and analytics group headquartered in Tokyo.

Entry 80: BVA BDRC is part of BVA BDRC Group.

Entry 81: 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 to achieve a global integrated CX and community panel platform.

Entry 83: Flamingo Research is part of Omnicom/DAS.

Entry 86: Nielsen Sports is part of Nielsen Global Media.

Entry 90: Jigsaw Research was acquired by STRAT7 in 2022 and became STRAT7 Jigsaw. See also Entry 49 in Notes on Top 50 Consolidated Businesses.

Entry 91: Ronin International is part of the Rippleffect Group.

Entry 96: Consulting at McCann Health is part of Interpublic.

Entry 100: Nielsen Netratings is part of Nielsen Global Media.

TOP 50 CONSOLIDATED BUSINESSES

Entry 1: Kantar is 60% owned by US private equity group Bain Capital and 40% by WPP plc.

Entry 2: The Ipsos 2020 result was substantially boosted by work undertaken by Ipsos MORI for the React Study on the impact of COVID 19, undertaken in partnership with the Dept of Health & Social Care and Imperial College London. The UK-based businesses of Ipsos include Ipsos MORI, Ipsos Interactive Services, Ipsos Retail Performance, Data Liberation, Synthesio, Askia, and Intrasonics.

Entry 4: During 2021 Wood Mackenzie was part of Verisk Analytics, a US-based energy sector group. At the beginning of November 2022 Verisk announced the sale of Wood Mackenzie to private equity firm Veritas Capital.

Entry 5: Dunnhumby is owned by Tesco plc.

Entry 11: NielsenIQ was created following the split of Nielsen 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." ACNielsen was the key component in the UK. In late 2020 Nielsen Connect was sold to private equity investor Advent International and was re-named NielsenIQ. See also Note on Entry 13 below on plans to combine with GfK.

Entry 12: Information Resources is a wholly owned subsidiary of IRI Group Holdings Inc, which is ultimately owned by Vestar and New Mountain Capital. Its 2021 turnover reflects the "purchase of sister companies".

Entry 13: In mid-2022, NielsenIQ and GfK announced agreement to be 'combined', with NielsenIQ's owner Advent International retaining majority shareholding. NielsenIQ and GfK will remain separate companies until completion of the deal in late 2022/ early 2023.

Entry 15: Fastmarkets is a division of Euromoney Institutional Investor plc.

Entry 18: Omnicom/DAS includes Hall & Partners, Flamingo Research, Adelphi International Research, The Planning Shop International, and C Space (part of Interbrand Group).

Entry 19: Majority ownership of Dynata Global is held by Court Square Capital Partners and HGGC. At the end of 2021 Dynata acquired Optimus, which combines data science, predictive analytics, and software solutions to target advertising and develop growth of brands.

Entry 20: Ascential includes WGSN (a trend forecasting company) and Edge by Ascential (formerly Planet Retail).

Entry 26: Nielsen Global Media includes Nielsen Media Research, Advertising Intelligence, Nielsen Netratings, Nielsen Book Services, and Nielsen Sports.

NOTES ON MRS LEAGUE TABLES

Entry 28: Informa includes Datamonitor and OMDIA (formerly Informa Telecoms & Media). OMDIA was formed following the acquisition by Informa of the HIS MARKIT TMT portfolio (in exchange for its Agricultural Intelligence Group), and by integration of that portfolio with its existing analysis and research units (Ovum, Heavy Reading, Tractica, and Wards Intelligence).

Entry 29: Cello Health was taken private in mid-2020 by Arsenal Capital Partners, a private equity firm which invests in healthcare and speciality 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". In early 2022 Cello Health sold its Digital Technology Advisory Group (DTAG) to private equity group Vespa Capital. DTAG includes 2CV, The Value Engineers, and Signal Agency, all of which will continue to be separately promoted. In March 2022 Arsenal Capital announced the merger of Cello Health with four of its other firms to form Lumanity, with a total of more than 1200 specialists serving pharma and biotech companies.

Entry 31: Toluna Group (formerly ITWP) consists of Toluna, Harris Interactive, and KuRunData (Chinese online research). The group is privately owned by investors including CEO Frederic-Charles Petit.

Entry 32: The parent of CRU International is Commodities Research Unit International (Holdings), and ultimate ownership is Mattelisa Ltd (registered in Jersey).

Entry 33: In early 2021 customer experience management specialist Medallia acquired UK-based Decibel Insight which deploys machine learning to identify problem areas on websites and apps. At the end of 2021 Medallia was itself acquired by software investment company Thoma Bravo.

Entry 36: Savanta is the insights and intelligence division of Next Fifteen Communications.

Entry 38: Kynetec merged in early 2020 with Kleffmann Group, combining two research specialists in agriculture and animal health.

Entry 39: Yonder Consulting is now a single unibrand business encompassing Yonder Consulting, Yonder Data Solutions, Decidedly and BrandCap.

Entry 40: BVA BDRC Group includes BVA BDRC, ESA Retail, Perspective Research Services, Alligator Digital, and Viewpoint.

Entry 44: Dentsu International includes Merkle Aquila Insight and B2B International. In late 2020 Dentsu announced the formation of a new agency called Merkle B2B pulling together five subsidiaries.

Entry 46: Forsta Worlwide was created in 2021 by the merger of Confirmit and FocusVision. At the end of 2021 Forsta announced a globalpartnership with Phebli to enable use of advanced voice analysis technology for both quantitative and qualitative research. Forsta Worldwide was acquired in 2022 by healthcare experience specialist Press Ganey.

Entry 48: IHS Markit Economics became part of S&P Global at the end of February 2022.

Entry 49: The 2021 turnover of STRAT7 Group represents ownership at that time of STRAT7, STRAT7 Bonamy Finch, STRAT7 Research Bods, and STRAT7 Crowd DNA. Subsequent acquisitions of Incite Marketing Planning (STRAT7 Incite) and Jigsaw Research (STRAT7 Jigsaw) have raised group turnover above £40m.

Pledge to make a difference in 2023

**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

Manifesto for Sustainability

**MRS
Net Zero
Pledge**
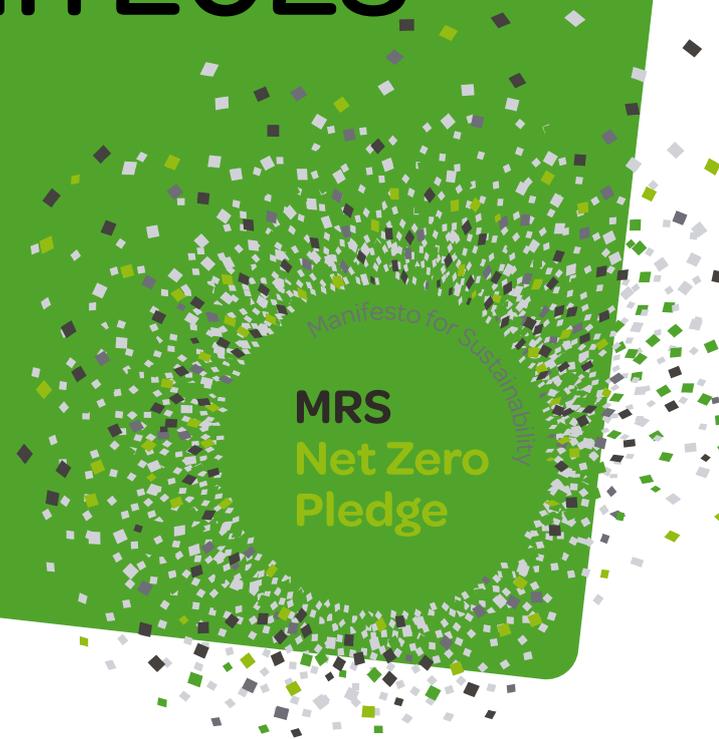
The NetZero pledge has been signed by:

7th Sense
Accent Marketing & Research
Bayes Price
Behaviorally
Behaviour & Attitudes Ltd
Big Sofa Technologies
Blue Marble Research
BMG Research
Box Clever Consulting
Britain Thinks
Bulbshare
BVA BDRC
Citrine Research
Cobalt Sky
Cogco
Community Research
Critical Research Ltd
Deep Blue Thinking
Differentology
DJS Research Ltd
Empower Translate
Engine Room

England Marketing
Enventure Research
Firefish
Focaldata
GfK
Glow UK Hub Ltd.
Harlow Consulting Services
Helix Research and Evaluation
IFF Research
Ipsos
Impact Research
Insight Now (OrbitaCX Limited)
InSites Consulting
LDA Research
Levercliff
MIS Group
MEL Research
Mindlab International Ltd
Monkey See
Morris Hargreaves McIntyre

Motif
MM-Eye Limited
MMR Research
mTab
MTC Research
MTM
Naked Eye
Ninth Seat
Opinion Research
Opinium
People For Research
Progressive Partnership
Quadrangle
RED C Research
Research Academy
Research Stories
Sapio Research
Savanta
Service Insights
Shift Insight
SMSR
Solutions Strategy Research Facilitation

Strategic Research and Insight LTD
Survey Initiative
Systra
The Behavioural Architects
The Crow Flies
The Nursery Research & Planning Ltd
The Young Foundation
Traverse
Vela
Vision One
VST
Walnut Unlimited
Watch Me Think
Winning Moves
Walr
Yonder Consulting
YouGov
Zappi

Find out why leaders have signed their organisations up to the Pledge mrs.org.uk/netzeropledge

MRS™

GENDER PAY GAP IN THE UK RESEARCH SECTOR

David Cahn, principal at synygis consulting
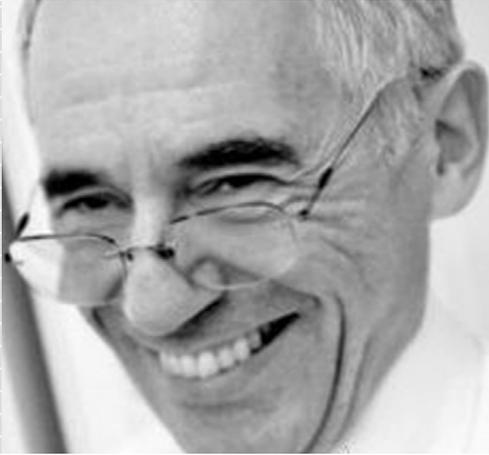
The UK research industry's Gender Pay Gap of +14.34% is very close to the national average. The research gap has slightly improved for females since the start of mandatory reporting in 2018.[1]

The Gender Pay Gap is the difference between average male and average female pay in an organisation. The Gender Pay Gap is not the same as unequal pay, where males and females are paid differently for performing the same, or similar, work (unequal pay has been unlawful since 1970).

GENDER PAY GAP IN THE UK RESEARCH SECTOR

In April 2018, companies with more than 250 employees were required for the first time to publish their Gender Pay Gap. Mandatory Gender Pay Gap reporting was paused in 2020 in response to the Covid pandemic and re-started in 2021.

For the reporting year 2021-2022, 10,188 employers submitted Gender Pay Gap returns, among them 25 research organisations.

THE GENDER PAY GAP IN THE UK

The national Gender Pay Gap for 2021-2022 was +14.9% among all UK employees, i.e. hourly pay for females was 14.9.% lower than for males, meaning females earn 85.1p for every £1 that males earn when comparing hourly pay.

This represents a marginal improvement on the +15.1% national gap for 2020-2021, and a definite advance on the gap seen for 2017-2018 (+17.8%), when mandatory reporting for larger companies commenced.

Longer term, the national Gender Pay Gap has been declining steadily over time; over the last twenty five years it has fallen by nearly 50% among all UK employees.[2]

THE 25 RESEARCH FIRMS WHO MADE A RETURN FOR 2021–2022 HAD A GENDER PAY GAP OF +14.34%, MARGINALLY MORE IN FAVOUR OF FEMALES THAN THE NATIONAL AVERAGE.

THE GENDER PAY GAP AMONG RESEARCH COMPANIES: 2022

The 25 research firms who made a return for 2021-2022 had a Gender Pay Gap of +14.34%, marginally more in favour of females than the national average.

Just one research organisation, the National Centre for Social Research (NatCen), reported an hourly pay gap in favour of females (-16.0%), while another two claimed hourly pay parity between females and males. Across the other 22 research companies, the hourly pay gap favoured males. This is broadly consistent with the proportions for all 10,188 companies reporting in 2022; 13% with a Gender Pay Gap in favour of females, 8% at parity, and 79% with a gap in favour of males.

The gap for bonus pay among research companies was rather less female-friendly at+35.9% in favour of males. Only one company, (Merkle UK Three), returned a bonus pay gap in favour of females (-20.0%), while IFF and Walnut reported no difference between female and male bonus pay. The male-oriented bonus gaps ranged from +16.7% (UK Statistics Authority) to +78.1% (IQVIA).

On the other hand, the percentage being awarded a bonus at all was balanced much more evenly by gender. Among females, 53.5% were in receipt of a bonus (males, 54.5%), and 13 of the 25 returning research organisations awarded a bonus to as many, or more, of their females as their males.

Research companies employ the same proportion of females as the 10,188 larger companies reporting in 2022 (47.6% vs.47.9%)., However research companies did employ slightly fewer females in the top pay quartile (38.3% vs 40.6%).

GENDER PAY GAP IN THE UK RESEARCH SECTOR

THE GENDER PAY GAP AMONG RESEARCH COMPANIES: MOVEMENT OVER TIME

24 research companies reported for both 2021-2022 and 2020-2021. The Gender Pay Gap for this group marginally widened year to year, (+14.30% in 2022 but +13.88% in 2021).

22 research organisations reported for 2021-2022 and also for 2017-2018, (the first year of direct reporting for larger companies and also pre-pandemic). Their Gender Pay Gap narrowed to +15.0% for 2021-2022 from +16.5% for 2017-2018.

Between 2017-2018 and 2021-2022, 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.[3]

The two companies achieving the largest narrowing of the pay gap between 2018 and 2022 were YouGov (+11.0%, down from +28.7%), and Information Resources (+25.7%, down from 39.1%). Taken as a whole, female representation either overall, or in the top pay quartile, did not improve among the 22 research companies reporting in both 2022 and 2018. But there were some notable individual successes. 13 research companies managed to increase the proportion of females in the top pay quartile over the four year period, while 11 research companies grew their proportion of female employees overall.

OTHER PAY GAP REPORTING

Attention to other types of pay gap are increasing.[4] Three research companies are now publishing their Pay Gap for Ethnicity – Ipsos, YouGov, and Merkle (who also provide their LGBTQ+ Pay Gap).

[1] The gender pay gap is calculated as the difference between average earnings (excluding overtime) of males and females as a proportion of average earnings (excluding overtime) of males. 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 females earn 10% less, on average, than males. Conversely, a -10% gender pay gap in hourly pay denotes that females earn 10% more, on average, than males. 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.

[2] 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 147,000 responses analysed in 2022.

[3] 2 reported a 0% gap in both years.

[4] For example, the Institute for Fiscal Studies (IFS) Deaton Review of Inequalities, published 14 November 2022, reported that ethnic inequalities in pay are persistent, but vary hugely between ethnic groups. Median weekly earnings among employees for Black Caribbean males were 13% below White British males in 2019, with Pakistani and Bangladeshi pay 22% and 42% lower, respectively.

22 RESEARCH ORGANISATIONS REPORTED FOR 2021–2022 AND ALSO FOR 2017–2018, (THE FIRST YEAR OF DIRECT REPORTING FOR LARGER COMPANIES). THEIR GENDER PAY GAP NARROWED TO +15.0% FOR 2021–2022, FROM +16.5% FOR 2017–2018.

GENDER PAY GAP IN THE UK RESEARCH SECTOR

INDIVIDUAL CALCULATIONS FROM RESEARCH COMPANY RETURNS

	% DIFFERENCE IN HOURLY RATE (MEDIAN) 2022	% DIFFERENCE IN BONUS PAY (MEDIAN) 2022	% WHO RECEIVED BONUS PAY (MALES) 2022	% WHO RECEIVED BONUS PAY IN (FEMALES) 2022	% FEMALES LOWER PAY QUARTILE 2022	% FEMALES IN LOWER MIDDLE PAY QUARTILE 2022	% FEMALES IN UPPER MIDDLE PAY QUARTILE 2022	% FEMALES IN TOP PAY QUARTILE 2022	TOTAL FEMALES 2022
Research Companies Reporting Gender Pay Gap 2022 (n=25)	14.34%	35.9%	54.5%	53.5%	54.1%	50.8%	47.0%	38.3%	47.6%
Average for All Companies Reporting Gender Pay Gap 2022 (n=10,188)	12.3%	0.8%	36.5%	35.3%	54.7%	50.2%	45.9%	40.6%	47.9%
ASHE 2022 (n=147,000)	14.9%								
National Centre for Social Research	-16.0%	50.0%	1.0%	2.0%	50.0%	56.0%	74.0%	71.0%	62.8%
Sensory Dimensions	0.0%	41.0%	4.0%	11.0%	72.0%	72.0%	74.0%	84.0%	75.5%
IFF Research	0.0%	0.0%	91.1%	86.8%	40.0%	61.0%	53.0%	55.0%	52.3%
Perspective Research Services	4.3%	23.5%	56.8%	51.4%	74.5%	46.8%	59.6%	46.8%	56.9%
Merkle UK Three	4.8%	-20.0%	18.0%	19.6%	50.0%	54.3%	51.1%	46.2%	50.4%
Nielsen	5.9%	27.4%	59.0%	59.0%	55.0%	53.0%	54.0%	47.0%	52.3%
Ipsos	8.4%	28.0%	52.0%	52.0%	57.0%	63.0%	61.0%	50.0%	57.8%
Kantar	9.0%	24.0%	38.0%	43.0%	49.0%	54.0%	47.0%	37.0%	46.8%
UK Statistics Authority	10.6%	16.7%	14.0%	18.3%	52.9%	52.1%	50.5%	49.4%	51.2%
YouGov	11.0%	45.0%	67.0%	64.0%	47.0%	47.0%	46.0%	34.0%	43.5%
Walnut Unlimited	13.7%	0.0%	1.4%	0.4%	70.0%	73.0%	77.0%	53.0%	68.3%
Medallia	15.5%	65.7%	59.4%	63.7%	43.8%	35.9%	37.5%	23.8%	35.3%
Iqvia	16.6%	78.1%	14.8%	9.7%	66.1%	58.4%	57.0%	43.4%	56.2%
Euromonitor International	17.5%	58.0%	91.0%	84.0%	59.0%	60.0%	52.0%	47.0%	54.5%
Markit Group	19.0%	32.6%	89.0%	88.0%	40.0%	30.0%	28.0%	18.0%	29.0%
Informa (Business Intelligence Division)	19.3%	61.7%	43.7%	37.3%	56.3%	49.0%	44.6%	27.2%	44.3%
GlobalData	20.2%	64.7%	39.5%	23.6%	46.8%	42.7%	37.6%	19.6%	36.7%
Dunnhumby	21.1%	36.2%	79.2%	71.0%	66.0%	51.0%	41.0%	32.0%	47.5%
CACI	21.3%	28.6%	54.3%	56.8%	31.0%	34.0%	14.0%	19.0%	24.5%
Verint Systems	21.9%	18.8%	94.0%	92.0%	36.9%	27.5%	16.4%	15.2%	24.0%
Wood Mackenzie	22.0%	45.0%	85.0%	87.0%	50.0%	39.0%	34.0%	21.0%	36.0%
Information Resources (UK)	25.7%	28.2%	91.5%	95.8%	65.6%	52.4%	49.3%	39.4%	51.7%
Gartner UK	27.8%	70.3%	100.0%	100.0%	56.0%	48.0%	41.0%	21.0%	41.5%
GfK UK	28.8%	47.5%	75.5%	82.3%	54.5%	47.0%	25.0%	23.2%	37.4%
Mintel Group	30.2%	26.5%	42.6%	38.4%	63.9%	63.1%	50.8%	33.6%	52.9%

COMPARISON OF RESEARCH COMPANY RETURNS 2022 VS 2018

	% DIFFERENCE IN HOURLY RATE (MEDIAN) 2022	% DIFFERENCE IN HOURLY RATE (MEDIAN) 2021	2022 VS 2021 MEDIAN PAY GAP	% DIFFERENCE IN HOURLY RATE (MEDIAN) 2018	2022 VS 2018 MEDIAN PAY GAP	% FEMALES IN TOP PAY QUARTILE 2022	TOTAL FEMALES 2022	% FEMALES IN TOP PAY QUARTILE 2018	TOTAL FEMALES 2018	2022 VS 2018 FEMALES IN TOP PAY QUARTILE	2022 VS 2018 TOTAL FEMALES
Research Companies Reporting Gender Pay Gap 2022 and 2021 (n=24)	14.30%	13.88%	0.42%								
Research Companies Reporting Gender Pay Gap 2022 and 2018 (n=22)	15.0%			15.9%	-1.0%	38.6%	48.0%	38.7%	49.2%	0.0%	-1.2%
Average for All Companies Reporting Gender Pay Gap 2022 and 2018 (2022=10,188; 2018=10,016)						38.3%	47.6%	39.2%	46.8%	-0.9%	0.8%
ASHE 2022 & 2018	14.9%			17.8%	-2.9%						
National Centre for Social Research	-16.0%	-18.0%	2.0%	-15.0%	-1.0%	71.0%	62.8%	75.0%	64.8%	-4.0%	-2.0%
Ipsos	8.4%	4.9%	3.5%	-0.9%	9.3%	50.0%	57.8%	43.5%	52.0%	6.5%	5.8%
Sensory Dimensions	0.0%	0.0%	0.0%	0.0%	0.0%	84.0%	75.5%	91.0%	78.0%	-7.0%	-2.5%
IFF Research	0.0%	0.0%	0.0%	0.0%	0.0%	55.0%	52.3%	49.0%	56.2%	6.0%	-3.9%
Perspective Research Services	4.3%	1.7%	2.6%	0.3%	4.0%	46.8%	56.9%	54.5%	55.1%	-7.7%	1.8%
Nielsen	5.9%	4.2%	1.7%	6.2%	-0.3%	47.0%	52.3%	42.0%	49.5%	5.0%	2.8%
UK Statistics Authority	10.6%	0.0%	10.6%	10.9%	-0.3%	49.4%	51.2%	43.0%	54.8%	6.4%	-3.6%
Informa (Business Intelligence Division)	19.3%	16.4%	2.9%	11.8%	7.5%	27.2%	44.3%	23.0%	34.9%	4.2%	9.4%
Mintel Group	30.2%	27.5%	2.7%	12.4%	17.8%	33.6%	52.9%	37.6%	49.6%	-4.0%	3.2%
GlobalData	20.2%	11.4%	8.8%	14.8%	5.4%	19.6%	36.7%	20.9%	35.4%	-1.3%	1.3%
Dunnhumby	21.1%	19.7%	1.4%	19.9%	1.2%	32.0%	47.5%	24.5%	42.0%	7.5%	5.5%
Walnut Unlimited	13.7%	12.2%	1.5%	20.0%	-6.3%	53.0%	68.3%	74.0%	86.0%	-21.0%	-17.8%
Euromonitor International	17.5%	15.2%	2.3%	21.6%	-4.1%	47.0%	54.5%	41.0%	51.8%	6.0%	2.8%
GfK UK	28.8%	33.9%	-5.1%	22.0%	6.8%	23.2%	37.4%	29.0%	46.8%	-5.8%	-9.3%
IQVIA	16.6%	18.7%	-2.1%	22.2%	-5.6%	43.4%	56.2%	44.9%	61.9%	-1.5%	-5.7%
Markit Group	19.0%	13.0%	6.0%	23.2%	-4.2%	18.0%	29.0%	28.0%	38.3%	-10.0%	-9.3%
Wood Mackenzie	22.0%	20.5%	1.5%	25.8%	-3.8%	21.0%	36.0%	19.0%	36.8%	2.0%	-0.7%
CACI	21.3%	20.8%	0.5%	26.5%	-5.2%	19.0%	24.5%	18.0%	26.8%	1.0%	-2.3%
YouGov	11.0%	30.0%	-19.0%	28.7%	-17.7%	34.0%	43.5%	22.0%	42.0%	12.0%	1.5%
Verint Systems	21.9%	22.6%	-0.7%	29.4%	-7.5%	15.2%	24.0%	13.0%	23.3%	2.2%	0.7%
Gartner UK	27.8%	32.1%	-4.3%	31.8%	-4.0%	21.0%	41.5%	20.0%	43.0%	1.0%	-1.5%
Information Resources (UK)	25.7%	36.6%	-10.9%	39.1%	-13.4%	39.4%	51.7%	37.8%	52.5%	1.6%	-0.8%
Merkle UK Three	4.8%	0.7%	4.1%	N/A	N/A	46.2%	50.4%	N/A	N/A	N/A	N/A
Kantar	9.0%	9.0%	0.0%	N/A	N/A	37.0%	46.8%	N/A	N/A	N/A	N/A
Medallia	15.5%	N/A	N/A	N/A	N/A	23.8%	35.3%	N/A	N/A	N/A	N/A

A PROVEN ABILITY TO ADAPT AND THRIVE

By Katie McQuater, editor,
Research Live & Impact magazine

The word 'permacrisis' entered the dictionary in 2022, and it has continued to be a challenging time for research businesses. But the picture is not all gloomy, so where has growth flourished? Katie McQuater spoke to a cross-section of research suppliers to find out.

For Kantar, ranking top of the league table, growth has come from three areas – existing data, bigger panels and acquisitions – according to Chris Morley, managing director of Kantar Worldpanel UK & Ireland, USA.

Morley says: "We have found new ways to gain insights from existing data, adding relevant new segmentations and analytics. Secondly, we are innovating with bigger panels and datasets and new user platforms to help make analysis of data quicker and easier. We have also made acquisitions (such as Numerator in the US) to expand our global reach and acquire new capabilities and technologies that we can use elsewhere."

With the UK in the middle of a cost-of-living crisis, Kantar's price monitoring and purchase data has been used by businesses to understand changes in buying habits. "We can see the areas consumers are prioritising, whether they be cutting costs in the face of price inflation or supporting the brands that mean the most to them personally," says Morley.

For BMG Research, the top agency in the 'fastest growers' table, growth has come from a "relentless" focus on clients for the past year, according to the company's head of research Simon Wood.

This has involved understanding clients' needs and producing actionable findings while managing their expectations. Wood says: "Clients have responded hugely positively – we're winning more work, being given work with minimal tender, and seeing clients approach us for help."

Growing organically has come from conducting more work with existing clients as well as winning new business, explains Wood. "We've sharpened our proposal winning capabilities and targeted non-clients so we have a wider client base, with more relationships. Alongside that, our focus on clients has meant we've increased the portfolio of work with the client base at the same time.

Client partnerships have also been crucial for MTM. "We've deepened our relationships with many of our top clients: through involvement in some of their foundational workstreams, and extending our involvement into further divisions of their organisations," says managing director Caroline Wren.

For MTM, growth has also come from an acquisition: the agency made its first in the second half of 2021, with the purchase of subscription business 3 Reasons, which offers market analysis and forecasting to the UK's TV and telco sector. Subscribers are c-suite and director level across the sector, complementing MTM's core work with technology, media and entertainment clients.

"WE'VE SHARPENED OUR PROPOSAL WINNING CAPABILITIES AND TARGETED NON-CLIENTS SO WE HAVE A WIDER CLIENT BASE, WITH MORE RELATIONSHIPS."
SIMON WOOD, BMG

THE NURSERY RESTRUCTURED THE MANAGEMENT TEAM AT THE START OF 2022 TO ENSURE THAT EVERYONE 'OWNED' AN AREA OF THE BUSINESS.

YouGov changed its sales structure a few years ago, from one that was product-focused, to one that is more client-focused. "We are now really starting to feel the benefits of this strategic shift," says chief executive Stephan Shakespeare.

As well as changing its sales structure to make it easier to expand the work it does with existing clients, the company has developed new tools to meet clients' needs – such as its self-serve YouGov Survey Direct tool.

Verve also expanded its offer in 2022, launching its Ignite proposition, which involves combining social intelligence and research specialisms including semiotics and anthropology.

Andrew Cooper, chief executive at Verve, says: "This has helped us win projects in territories we had not previously competed in, and against competition we had not previously engaged with; resulting in organic growth within our existing accounts, alongside developing new client relationships." By expanding its range of services in this way, Cooper says Verve can produce more "triangulated" insights.

Consciously adapting its working practices has also helped the business to grow, according to Cooper, giving the staff and clients greater flexibility in how they work together. He says this has led to a "strong, diverse, integrated team".

At The Nursery, an employee-owned business, a big part of the recent focus has been sharing the load across its employees – the company restructured the management team at the start of 2022 to ensure that everyone 'owned' an area of the business. Chief executive David Alterman explains that The Nursery has "encouraged everyone to contribute to the success of the business they own through working groups, internal workshops, thought leadership projects and new product ideas". Alterman adds: "I am sure that passion has helped us win business."

The Nursery recruited a new head of health in late 2021 to launch a new offer in the sector, which has been successful for the growth of the business. It has also looked to grow organically by strengthening relationships with existing clients and addressing "untapped opportunities", but has also maintained a focus on acquiring new clients.

The pandemic continued to be a large focus of the work of the National Centre for Social Research (NatCen); until the first half of 2022, it supported data collection for the ONS Covid-19 infection survey (CIS).

"Our role in the CIS finished in the first half of 2022, and our focus has returned to managing and developing our large portfolio of population and longitudinal surveys, policy research and evaluation, and attitudinal work, as well as generating new commissions and implementing our plans for growth and diversification," says chief executive Guy Goodwin.

NatCen has grown its research portfolio with both existing and new clients. "Large-scale studies that were on pause during the pandemic are underway again, and we are seeing high demand for social surveys from our government customers."

Additional data collection, analysis and reporting has taken place for a number of flagship research projects, including reporting on the Study of Early Education and Development and the Mental Health of Children and Young People in England as well as its regular reporting from surveys such as the Health Survey for England.

NatCen has also seen increased opportunities for studies evaluating policy initiatives and interventions and is increasingly expanding out to new customers and sectors as it has grown its team.

It also sees opportunity overseas, with the launch of NatCen International, an international social research programme designed to address pressing global challenges including climate change and social inequalities. "We are excited to be opening up our expertise and resources to help decision makers beyond NatCen's traditional geographical boundaries," says Goodwin.

PRESSURE FACTORS

Our contributors mentioned various issues causing pressures for them and their clients. Unsurprisingly, uncertainty and macroeconomic factors have continued to create challenging business conditions.

"Certainly, budgets are tight and, like everyone else, we really need to show our value," says Kantar's Morley. "Research has to clearly demonstrate its unique position in a client's decision-making process, using corporate, business language, or else they won't buy."

When under pressure, many clients focus on tactical work with a smaller investment and a quicker turnaround time, notes Morley. "Many are being more cautious and feel due to the uncertainty leading into 2023 they need to manage costs carefully. Yet when the climate rebounds, I'm confident that many businesses we work with will recommission the more strategic projects that were put on hold."

"Client budgets aren't rising, but our costs are," says BMG's Wood, who also points to other agencies taking on work for lower fees than usual. "The danger is they are under-pricing, and dragging us all down in a race to the bottom."

"THE 'RESPONDENT PROBLEM' IS AN INDUSTRY-WIDE ISSUE WE CAN'T IGNORE AND THAT WILL INCREASINGLY (AND RIGHTLY) START TO DOMINATE THE CONVERSATION."
ANDREW COOPER, VERVE

"WE CONTINUE TO ADAPT TO CHANGING CONDITIONS BY CREATING MORE EFFICIENT TECHNOLOGY AND SMARTER STATISTICAL MODELS TO SUPPORT OUR WORK, OFFERING WORLD CLASS DATA PRIVACY PROTECTIONS, AND DEEPENING THE WORLD'S STORE OF KNOWLEDGE."
CAROLINE WREN, MTM

The Nursery's Alterman points to two main pressures – firstly, cuts to marketing budgets and "persuading clients that research is an investment, not a cost". Secondly, delays to decision making and spend "make scheduling work and resource more difficult", he adds.

A difficult recruitment market has created challenges for the return to face-to-face fieldwork, says NatCen's Goodwin. "Coming out of the pandemic, we have been building back and expanding our interviewer panel in order to meet requirements for projects that were paused during the pandemic, as well as new requirements for face-to-face interviewing. This has proved challenging in a difficult recruitment market, but we are committed to continuing to build our field capacity."

While acknowledging the "perennial pressure" on research agencies to balance quality and speed, Verve's Cooper says: "A key aspect of this conversation which is becoming more prominent is the standard of the data itself underpinning the insight. All our work ultimately lives or dies on the quality of the people we talk to – we need to be more concerned than ever with making sure research is speaking to the right people."

Cooper concludes: "While not necessarily the single biggest pressure factor right now, the 'respondent problem' is an industry-wide issue we can't ignore and that will increasingly (and rightly) start to dominate the conversation."

Meanwhile, YouGov's Shakespeare highlights two pressure factors standing out for clients: "The first is that wage inflation in tech has made it harder for clients to hold on to experienced staff. The second is that general economic uncertainty is making companies hesitant about making investment decisions."

OUTLOOK

MTM's Wren says 2022 began with a feeling of "bouncing back from the pandemic" that became "a bumpy ride through geopolitical events", with a sense of a future that remains "deeply uncertain" – all of which has made for tougher business conditions in the second half of the year, she adds.

However, Wren highlights the resilience of the research industry and how it has responded to challenges such as sustainability. "Professionals in the market research and insight industry are resilient and innovative. We continue to adapt to changing conditions by creating more efficient technology and smarter statistical models to support our work, offering world class data privacy protections, and deepening the world's store of knowledge. For example, our industry has been pushing back the boundaries of knowledge that help public sector and commercial organisations improve their diversity, equality & inclusion practices, and supporting many organisations in adapting their portfolios to better suit a cost of living crisis.

Last but not least, I'm proud of this industry for the way we're signing up in increasing numbers to work towards net zero carbon much faster than most industries."

Brands will need greater support to redefine themselves in 2023, predicts Wren. "Clients across all sectors will need genuine support to navigate what consumers are looking for in these changing times, whether in terms of more sustainable products or more useable services. Sectors where there has been a recent proliferation of new entrants will likely settle into more mergers, or new types of aggregation solution that improve consumer convenience."

What are the other growth opportunities for research? According to Wood, either from radically innovative approaches or convincing more clients of its value. "We've said for years that automation and technology will lead to cost savings and all its doing is pushing prices down and making margins tighter. In reality, I think it's going to be either from radically new techniques that can truly be done at scale – whether video qual, data collection in the metaverse or similar – or growing the whole market so more clients see the value in market research and are willing to spend the money on it they would on an ad campaign." Where growth won't come from, Wood is adamant, is "shaving 30 minutes off the time it takes to create a set of tables, or grilling avatars with 45 minute dull surveys".

"WE NEED TO TRY AND BRING THESE APPROACHES TOGETHER, THROUGH JOINED-UP RESEARCH ECOSYSTEMS, CREATING THE GLUE TO PUT THE PARTS TOGETHER."

ANDREW COOPER, VERVE

Alterman is optimistic about growth opportunities for The Nursery following its B Corp certification. "There is a fascinating community of businesses, companies, brands who share our commitment to making business a force for good."

He also expects more work to be multi-disciplinary, joining up qual, quant and analytics, and says the shift to online qual has created opportunities: "Our international qual work goes from strength to strength as the move online has eliminated some of the barriers to growth for a London based agency researching around the world."

Key to supporting "future-facing innovation" will be leveraging the value of established approaches and being ready to draw on new methods, says Cooper: "We need to try and bring these approaches together through joined-up research ecosystems. Businesses often have lot of data sources, but a key challenge they face is pulling together all these disparate datasets and unlocking the value within them."

Lastly, Morley predicts: "With more discerning customers, agencies who have the most meaningful or unique data and the expertise to be seen as a trusted adviser will succeed. Speed, which has always been a differentiator, will become more important, because a larger proportion of the decisions that our clients need to make are in response to a faster changing or relatively short-term market situation."

A FLEXIBLE AND INCLUSIVE WORKING ENVIRONMENT IS THE KEY TO THE TALENT CHALLENGE

Sinead Hasson, managing director, Hasson Associates

It's been another interesting year in MRX recruitment, and I think it's fair to say that after the last 12 months the power is now most definitely with the job seeker.

The effects of the pandemic and Brexit combined have completely reshaped the work force.

VIEW FROM A RECRUITER

80,000* people are estimated to have left the work force due to long Covid. 500,000** left the work force as a result of the pandemic; many took early retirement and others changed careers. The effects on the workforce of Brexit are also significant, reducing the numbers of EU nationals that migrated to the UK every year for their careers.

WHAT DOES IT MEAN FOR MRX?

It means we have to be better at attracting talent, better at securing talent, better at rewarding talent, and better at providing long term careers.

This year we have seen a conscious shift to embrace hybrid working as a permanent part of working life. This has had an impact on enabling parents where location was an issue to come back into the workforce. Contracting has continued to grow, salaries have risen, and companies are being more creative in terms of solutions. So for the first time in a long time we are seeing more part time roles.

All this is positive news for the industry and will help us to bring in and retain the vital talent that is needed.

It will always be a challenge, but in the last 12 months there have been several initiatives launched by and supported by MRS that tackle some of the issues we face.

These range from 10,000 Black Interns to the MRS apprenticeship scheme which focuses on getting new talent in at entry level. The new school roadshow will also do great work to bring in early years talent. The MRS Inclusion Pledge continues to offer support to all signees who want to build on their own employer brand and employee experience. If you are an SME or micro business this is a great way to create a positive and inclusive work environment without the expense of an HR department.

A recent survey we carried out amongst our database shows that for people the most important thing is their working environment. They want to see conscious steps towards providing an inclusive and diverse working environment. If you start there, I think you will be on the right road to creating the culture you want with the workforce you need to achieve your goals.

Wishing you all a great year ahead.

A RECENT SURVEY WE CARRIED OUT AMONGST OUR DATABASE SHOWS THAT FOR PEOPLE THE MOST IMPORTANT THING IS THEIR WORKING ENVIRONMENT.

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PREPARING FOR THE TOUGH ROAD AHEAD

By Katie McQuater, editor,
Research Live & Impact magazine

Centralising research teams, focusing on storytelling, combining insight and analytics, and employing agile in-house platforms have all worked well for client-side insights executives in the past 12 months, as they prepare for more disruption and uncertainty.

Georgie White, director of customer experience and insight at Holland and Barrett, has been focused on establishing a new insight function after joining the business in 2022.

This embedding of insight has involved "bringing together analytics and market research to drive greater insight and impact", says White, who adds that an approach of focusing on "storytelling and business partnering" has driven "real commercial performance" at the health shop business.

Across the insight industry more generally, White praises "encouragingly good progress made on ensuring research is more inclusive using the MRS guidance and principles", however she notes that further work is needed to standardise this. "Every client and agency should be ensuring they're doing this – there really isn't an excuse not to in 2022 and the benefits are very clear."

At workplace pension scheme the National Employment Savings Trust (Nest), centralising the research team with data and analytics is proving fruitful, according to Christina Finlay, director of data, digital and customer insight. "It is starting to show benefits in how we layer the 'how' and 'what' of customer action with the 'why', she explains. "Getting researchers to collaborate with analysts and modellers has been really insightful for us. This is all a part of our journey to help make insight simpler and more actionable for Nest."

At the BBC, a new performance framework to align everyone around key measures of success, based on various data sets including its own measurement of its audiences, has been a "game changer", according to director of audiences Nick North.

A new segmentation has also worked well for the broadcaster, explains North. "One of the challenges at the BBC is to draw together many different data sources into a coherent picture of our audiences; to this end we've had real success in developing a new segmentation which can be applied to all our insight and measurement data sets, giving us a richer picture of specific audiences' attitudes and media choices."

Lastly, real-time, multi-source insight on unfolding events became a more essential part of the team's work in 2022, which was particularly pertinent after the Queen died. North says: "We brought together real time measurement of our online users, same day survey results, cross-media measurement, social listening, search trends, direct contacts to the BBC, all to inform decisions in the moment, from the announcement of the death of the Queen to the state funeral."

At brewing company Carlsberg, the group insight and analytics team has been "central" in helping the organisation with its long-term strategic priorities and aiding its response to disruption from supply chain shortages, rising cost, inflationary costs and the war in Ukraine.

Nick Rich, vice president of insights and analytics, says the function participated in developing the company's new five-year strategy. "From laying down the fundamental future category trends and drivers to sizing consumer demand in new segments, it's been amazing to see how the business is now engaging with us compared to where we were a few years ago."

Rich credits this to the success the brewer has had in building a "strong foundational knowledge base and eco-system of tools and applications".

He adds: "On top of all this, after two years of pandemic response, we're still dealing with the fallout of a world disrupted. First it was supply chain shortages, followed by rising costs and now we're seeing the inevitable inflationary increases. And then, of course, there is the awful war in Ukraine."

REAL-TIME, MULTI-SOURCE INSIGHT ON UNFOLDING EVENTS BECAME A MORE ESSENTIAL PART OF THE BBC TEAM'S WORK IN 2022, WHICH WAS PARTICULARLY PERTINENT AFTER THE QUEEN DIED.

FOCUS ON METHODS

Richard Thomas, insight director at Future Publishing, praises "in-house, agile platforms" in the application of research, and says these have allowed for "proprietary ownership of process and output, and timely responses to business challenges requiring research and insight".

Looking ahead, Thomas wants to employ more behavioural and qualitative methods in the next year. He says: "Given that our focus has been primarily on online surveys, I am keen to use more behavioural and qual methods in 2023, alongside online quant and qual, in order to deliver more depth and insight than is allowed by solely relying on ask and answer methods – bridging the 'say-do gap'."

The BBC's data scientists and analysts are using new techniques to help solve research problems and increase the impact of insight across the organisation, according to North. The team have also seen success in bringing research to life through perspectives from viewers themselves.

"We routinely have senior managers, programme makers, journalists, and product managers meet real people to ensure the insight we produce resonates beyond the reports," says North.

The audiences team is also looking at how it can work more closely with its internal customers, in a bid to "change the culture to be insight-led", explains North.

Carlsberg's insights and analytics function is always looking to drive scale. The centralised team has focused on its biggest priorities and where it can make efficiencies, says Jenny Syddall, global insights and analytics director.

This has involved embedding a set of protocols and preferred suppliers on disciplines like advertising development, concept validation, and pack and product-testing. The team is particularly proud of its redesigned global brand health tracker, says Syddall, which includes category, demand space and brand equity.

At Nest, addressing gaps in customer experience will be a key priority for Finlay in 2023. "We'll be spending quite a bit of time doing customer journey maps – we know that there are gaps in our customer experience, and we also want to use frameworks to ensure that we're putting our insight into context. Customer journey maps will help more people at Nest to visually understand gaps and next steps for our members."

"**I AM KEEN TO USE MORE BEHAVIOURAL AND QUAL METHODS IN 2023, ALONGSIDE ONLINE QUANT AND QUAL, IN ORDER TO DELIVER MORE DEPTH AND INSIGHT THAN IS ALLOWED BY SOLELY RELYING ON ASK AND ANSWER METHODS.**"

RICHARD THOMAS, INSIGHT DIRECTOR,
FUTURE PUBLISHING

DATA VISUALISATION AND INCREASING DATA INTEGRATION INTO OTHER PLATFORMS IS ALREADY A KEY AREA OF FOCUS FOR CARLSBERG'S INVESTMENT IN INSIGHT, AND THE TEAM EXPECT THIS TO CONTINUE IN 2023.

BUYING IN RESEARCH SERVICES

The BBC has recently undertaken a tender process to renew its framework agreement that consists of a range of research agencies of varying sizes, and North is looking forward to seeing what fresh perspectives they can bring alongside the broadcaster's long-standing partners. "The whole department is excited to embrace any new and cutting-edge methodologies that will unlock new insight."

New observational techniques to better understand attention and proven ways of predicting success will also pique the team's interest.

At Future, Thomas wants agencies to be work as partners and get "under the skin of specific research needs, saying:

"We will buy in what we can't do ourselves in-house, so agencies need to have a clear point of difference and be rigorous in questioning and understanding our brief - as we often need help to define exactly what approach is required."

Data visualisation and increasing data integration into other platforms is already a key area of focus for Carlsberg's investment in insight, and the team expect this to continue in 2023. It will also look to fully utilise tools that allow for "super-quick" consumer input and reaction. "As the questions we receive become more sophisticated, you need quicker reaction tools and services to get the answers. We always believe in 'quality over speed' when it comes to insights but today, we don't have to make such trade-offs," says Rich.

White will look for a greater focus on driving value from insight in the next year. She's also keen to work in partnership with agencies to ensure research is fully inclusive, and notes that suppliers who work collaboratively with insights teams will ensure work has maximum impact.

In terms of how not to get noticed, however, sales emails leave her cold. "While I understand why so many individuals look to drive new business, and use email to do so, please stop the cold sales emails. I must receive three to seven a day and I simply don't have time to respond to them. I've never once developed a partnership via this route and never will."

Carlsberg's Syddall also flags the issue, noting that the team struggle to respond to multiple approaches daily. "I'm sorry to say that we simply do not have the time to engage with everyone. It's frustrating and we wish it could be different, but we hopefully don't miss the best new ideas and will always respond if we see something truly differentiated and meaningful for us."

The Carlsberg insights team is typically looking for agencies that can work at scale across markets and sees value in nurturing its long-term relationships with agency partners. "Beyond this, we like agencies who bring new perspective, but with a heavy dose of pragmatism."

For Finlay, it's important for agencies to ensure that nothing produced is standalone and that it's part of the pitch. "Anything produced should add to what we have now (i.e., using our segmentation, starting from our behavioural analysis) and any research should be done with a mind to explaining what we see in our data," she says.

FUTURE OUTLOOK

Looking ahead to 2023, clients are expecting a challenging environment for insight as organisations feel the effects of inflation and increased living costs, with one word standing out for the road ahead – 'tough'.

"Across various sectors it will be tough as we see consumers pull back spend further and brands will need to fight harder to convince consumers to spend their cash," says White.

According to Thomas, a "tough, challenging" operating environment for businesses is "most likely to be ridden out by those with diversified revenue streams, great brands, and strong relationships with their audiences".

Carlsberg is also expecting difficult conditions. "Like most FMCGs we are steeling ourselves for a tough year," says Syddall. "But even in the midst of a crisis, there are always green shoots, so we continue to remain positive."

"BRANDS WILL NEED TO FIGHT HARDER TO CONVINCE CONSUMERS TO SPEND THEIR CASH."
GEORGIE WHITE, DIRECTOR OF CUSTOMER EXPERIENCE AND INSIGHT AT HOLLAND AND BARRETT

MRS BUSINESS SENTIMENT MONITOR

The new bi-annual MRS Business Sentiment Monitor takes a snapshot of business owners' views on their business, the industry and the UK economy. The monitor will provide data with which to brief the UK government and comparable statistics against other European countries via the EFAMRO Moodindicator.[1]

The same measures of Company and Industry Expectations have previously been collected as part of the MRS Annual Survey, so are available for comparison.

For the first wave of the stand-alone monitor, invitations were sent to 2250 companies between 27 October and 8 November 2022, and 64 responses were received.[2] Of these, 42 reported annual turnover of up to £5mill, and 22, more than £5mill.[3]

COMPANY EXPECTATIONS

MY COMPANY REVENUES IN THE YEAR AHEAD

	D/K	Lower	Same	Higher
BSM Oct–Nov 2022	-2%	-20%	25%	53%
Annual Survey Mar–Apr 2022	-6%	-7%	15%	72%
Annual Survey Mar–Apr 2021	-2%	-7%	33%	58%
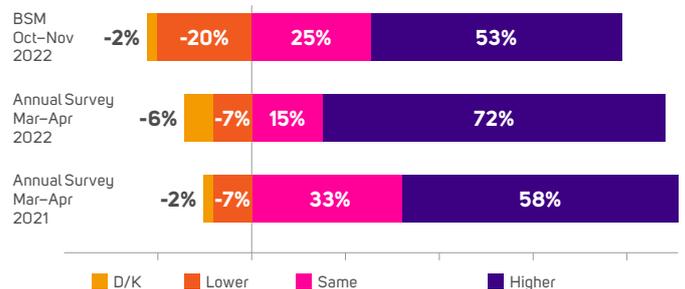
53% (34 companies) anticipated a revenue increase next year, while 20% (13 companies) predicted a revenue decline. No change was expected by 25% (16 companies). These proportions were very similar for smaller companies (up to £5mill), compared with larger companies (more than £5mill).

The optimism of Spring 2022 has now definitely receded. Six months ago nearly three quarters (72% of 53 organisations) expected their revenues to improve in the year ahead – by far the highest proportion encountered since we began collecting these data in 2011. Only 7% (four companies) felt their revenues would actually decline.

The average percent revenue growth anticipated in the Spring was +12%, but has now retreated to +4%.

MRS BUSINESS
SENTIMENT MONITOR

INDUSTRY EXPECTATIONS

THE INDUSTRY OVER THE NEXT 12 MONTHS

BSM Oct–Nov 2022	-2%	-28%	50%	20%
Annual Survey Mar–Apr 2022	-7%	-6%	36%	51%
Annual Survey Mar–Apr 2021	-4%	-7%	37%	42%

■ D/K   ■ Lower   ■ Same   ■ Grow

UK ECONOMY

THE UK ECONOMY OVER THE NEXT 12 MONTHS

-41%	-42%	6%	9%	2%

■ Decline significantly   ■ Decline slightly   ■ Same   ■ Improve slightly   ■ Improve significantly
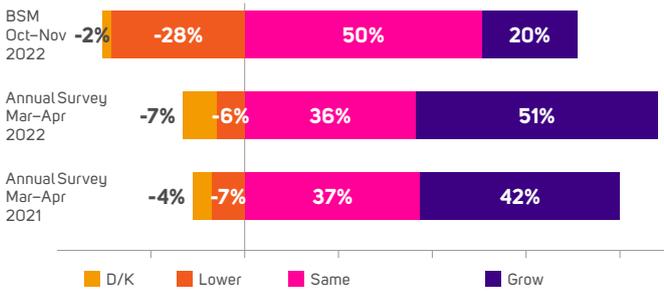
The last six months have seen a radical reassessment in industry expectations. Optimists expecting the industry to grow in the next twelve months – 20% (13 companies) – were outweighed by the pessimists anticipating a decline – 28% (18 companies). No change was predicted by 50% (32 companies).

Expectations for the industry were far more upbeat in Spring 2022, with 51% (27 participants) expecting the industry to grow over the next twelve months – the most bullish stance in the last five years. Only 6% (three participants) thought the industry would shrink.

In view of widespread pessimism in the media and among experts including the Bank of England, and talk of a recession, it was to be expected that only 11% (seven companies) thought the UK economy would improve over the next 12 months, while 83% (53 companies) believed the economy would decline.

The next Business Sentiment Monitor is planned for Spring 2023, as part of the MRS Annual Survey.

[1] Participants were asked:
 "Thinking about the year ahead, do you think your research revenues will be higher than, lower than, or about the same as [this year]?"
 "Looking at the research industry in the UK overall, what are your expectations over the next twelve months?"
 " Which of the following best describes your feeling about the overall UK economy in the next 12 months?"
[2] There will always be a tendency for those with positive expectations to respond better than those with a less good outlook.
[3] In Spring 2022, 34 of the 53 responders were in the under £5mill category.
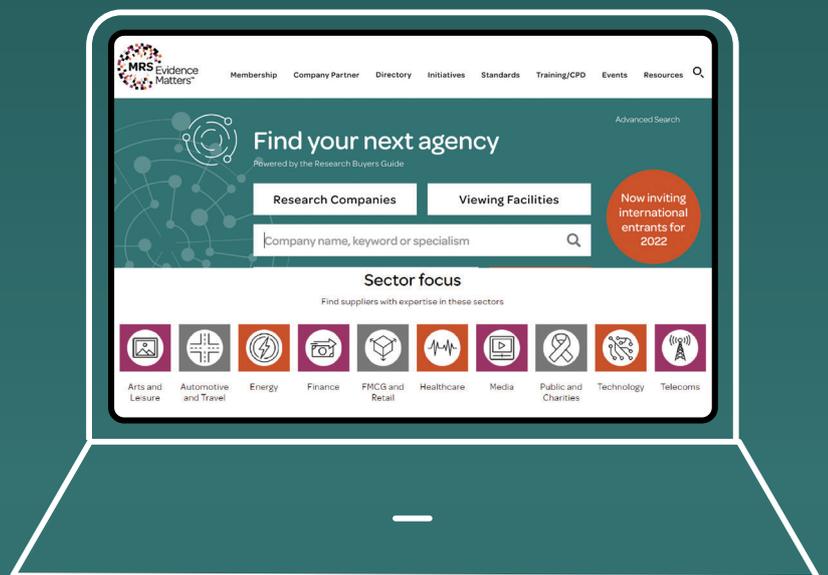
MRS PRESIDENT'S MEDAL 2022

*An interview with Ammar Maleki, founder and director of GAMAAN
and Pooyan Tamimi Arab, secretary of GAMAAN*

Ammar Maleki

Pooyan Tamimi Arab

When research from international opinion polling companies found time and again that the majority of the Iranian population described itself as both religious and supportive of Sharia in Iran, something felt off to those with lived experience of the country.

These findings were widely repeated in Western media and government policy as fact. However, the research was based on telephone or in person interviews; modes that do not guarantee anonymity. In a surveillance state where human rights are routinely violated, such modes make truthful responses extremely unlikely. In 2020, Dr. Ammar Maleki, Assistant Professor of Comparative Politics at Tilburg University, and Dr. Pooyan Tamimi Arab, Assistant Professor of Religious Studies at Utrecht University, developed a new methodology to understand the 'non-public' opinion that Iranians fear to reveal, usually at risk of imprisonment and torture.

The findings show increased secularisation of the population with 47% of respondents stating that in their lifetime they had changed from being religious to non-religious, and only 22% support the idea of an Islamic Republic. GAMAAN's surveys and these findings repeatedly went viral, and in response the Islamic Republic blocked the Survey Monkey App, and in 2022 the supreme leader Khamenei himself discredited the research. Despite data gathering and security challenges, GAMAAN's findings continue to debunk myths about Iranian society and contribute to a clearer understanding of how Iranians feel and why protests and civil unrest is sweeping across the country.

The hijab should be mandatory in public (in Iran)

■ Disagree ■ Agree ■ Neither agree, nor disagree

	Disagree	Agree	Neither
50-year-old +	74,3%	14,0%	11,7%
30- to 49-year-old	68,4%	16,6%	15,0%
20- to 29-year-old	78,1%	13,1%	8,8%
Urban	74,1%	13,1%	12,8%
Rural	65,9%	23,0%	11,2%
University educated	79,8%	9,5%	10,7%
Non-university educated	69,6%	17,2%	13,2%
Man	71,0%	17,3%	11,7%
Woman	74,0%	12,6%	13,4%
Total	72,4%	15,1%	12,5%
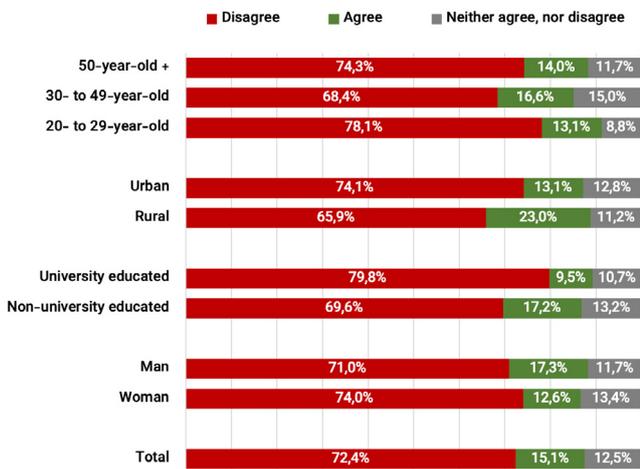
Survey June 2020
GAMAAN.org

GAMAAN's 2020 survey results show that most Iranians, of all demographic backgrounds, oppose the compulsory hijab.

CAN YOU BRIEFLY SUMMARISE HOW YOUR METHODOLOGY DIFFERS FROM THAT USED BY OTHER ORGANISATIONS TO UNDERSTAND OPINION IN IRAN?

MALEKI: Our surveys are conducted online. They are anonymous and give respondents a greater feeling of being safe. To generate reliable results, we mass disseminate the survey links through the most used social media platforms in Iran, used by about 85% of the population (see fig below). We spread the links through major digital channels as well as the specific pages and channels of groups that are harder to reach such as women, people who live in rural areas, and proponents of the regime. Since 2021 we also collaborate with Psiphon, which is among the most used VPN applications in Iran and they distribute the survey link to hundreds of thousands of people who connect to the Internet. Our survey sample sizes are large, for example in the last survey conducted in 2022 about 20,000. We then employ weighting and matching methods to generate a representative sample of the target population.

On which platform did you encounter this survey?

Psiphon	Telegram	WhatsApp	Instagram	Others	Twitter
33,8%	17,9%	16,9%	15,7%	9,0%	6,7%
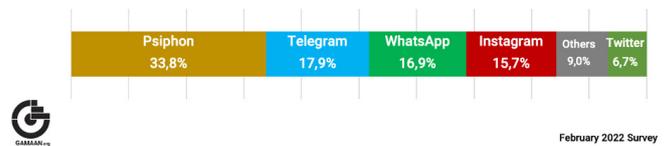
February 2022 Survey

The distribution of sample across digital platforms for GAMAAN's 2022 survey results.

TAMIMI ARAB: It is perhaps also worth mentioning that our approach to surveying is interdisciplinary. For example, to design questions about religion we combined insights from disciplines such as anthropology and sociology with political science and public opinion research methods. We worked with Ladan Boroumand, who received the Lech Walesa Prize for her work to promote democratization in Iran, someone with deep knowledge of Iranian history. Or when we did a survey on the death penalty, we consulted a legal expert and human rights defender such as Shirin Ebadi, a Nobel Peace Laureate. By combining disciplines and relying also on the advice of experts inside and outside Iran, we make sure that our approach is context-sensitive. Sensitivity to context appears to have been lacking in some of the major survey institutes that conducted research in Iran, producing results that appear absurd to Iran analysts of different political persuasions.

HOW DO YOU ENSURE THE RESEARCH IS REPRESENTATIVE? DON'T SOCIAL MEDIA ECHO CHAMBERS JUST REFLECT THE MORE EXTREME POSITIONS OF OPINION?

MALEKI: Conducting successful so-called non-probability surveys is no sinecure. But our innovative data gathering methods – our access to the population, being able to repeatedly make surveys go viral and with the cooperation of a major VPN platform – are not ordinary and have not been done in the same way in other countries. We systematically target all major groups to make sure that we can gather data from all walks of life and regions. We check our sample quality in real-time and adjust our targeting strategy accordingly.

To make sure our results are representative, we have successfully replicated external data such as on employment rates, household income distribution levels, and the languages people speak at home. We have also successfully replicated politically non-sensitive results of the World Values Survey's last research in Iran, conducted in 2020 by face-to-face interviews.

TAMIMI ARAB: Moreover, there are other external data that match our results. For example, when studying Iranians' secular shift, away from institutionalized religion, it is noteworthy that the Iranian state's own figures on topics such as baby names show a sharp decline in popular Muslim names. And, of course, the current uprising, which has already been called a revolution, shows that results such as that a majority oppose the compulsory hijab match field experiences. In fact, no one specialized in Iran was surprised to find a secular shift. The only question was to which extent this process had already developed and whether interesting demographic patterns could be detected.
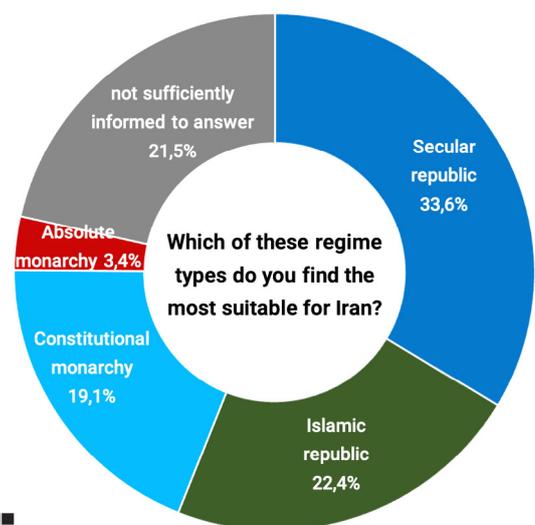
February 2022 Survey

GAMAAN's 2022 survey results show that only one out of five Iranians think the Islamic Republic is the most suitable regime for Iran.

ARE YOU CONCERNED ABOUT GOVERNMENT INTERVENTION AND ATTEMPTS TO SKEWER YOUR RESULTS USING FAKE ACCOUNTS ETC.?

MALEKI: Yes, this is a challenge that we are always alert about. We monitor the sample in real-time. We also use digital mechanisms such as to avoid multiple responses per device and bot attacks on the survey. We also test respondents' honesty, using controlling questions.

IS THERE STILL FEAR AMONG THE IRANIAN POPULATION THAT EVEN ONLINE RESPONSES ARE MONITORED AND NOT ANONYMOUS, POTENTIALLY LEADING TO REPRISALS?

TAMIMI ARAB: Fear is not a static phenomenon, even though it certainly plays a role in any Iranian interactions that may be charged politically. While it is a challenge to get pro-regime individuals to participate in our survey, it is also a challenge – even online – to convince a fearful population to participate and answer honestly. Our assistants showed us various instances of respondents expressing their concerns, even if the survey was conducted anonymously by an institute based in the Netherlands.

MALEKI: We should also consider that Iranians know how to be present on social media with pseudonyms, which is a daily routine for them. The context-specific ways in which Iranians use the internet are crucial to understand why this research is feasible in Iran. On the other hand, many people are eager to express their opinions on socio-political issues if they feel they would leave no evident footprint. So we try to provide this safe mode to respondents.

HOW DO YOU ENSURE PARTICIPATION FROM THOSE WHO DON'T HAVE ACCESS TO THE INTERNET? ARE THERE PARTICULAR GROUPS THAT REMAIN HARD TO REACH?

MALEKI: We always mention in our reports and media appearances that our target population are "literate adults" as for answering an online survey, a respondent should be able to read and use mobile phones or a computer. We know that about 85 to 90 percent of Iranians are literate. On the other hand, other research and surveys showed that the opinions of the illiterate population are not very different from those with lower education. So, the results of our survey with a specific margin of error can be generalized only to the target population. Right now, we are working on developing a mixed methods approach that will allow us in the near future to collect samples from those groups that are illiterate and have no access to the internet.

IRANIANS KNOW HOW TO BE PRESENT ON SOCIAL MEDIA WITH PSEUDONYMS, WHICH IS A DAILY ROUTINE FOR THEM.

WHAT COMMUNICATIONS TACTICS DO YOU USE TO APPEAL TO CONSERVATIVE, AS WELL AS LIBERAL VIEWS?

MALEKI: Other than using different images, we usually have various promotional texts for different groups of people. For instance, we understood that if we use some religious elements or a quotation from the supreme leaders of the Islamic Regime in our promotion, the regime supporters and conservatives may participate more. On the other hand, the survey itself matters a great deal of course. We strive to design professional and impartial questions and answer items, which are crucial to convincing people to participate. People with different socio-political orientations should find their desirable answers and positions on each question. We design our questions given these standards so that all respondents feel that their preferred options are not excluded.

30- to 49-year-old	46.0%	40.8%	6.9%	6.4%
20- to 29-year-old	51.8%	38.9%	4.7%	4.7%
Urban	48.3%	41.6%	4.9%	5.2%
Rural	41.1%	41.0%	10.1%	7.9%
University educated	51.0%	38.7%	5.1%	5.1%
Non-university educated	45.2%	42.5%	6.3%	6.0%
Man	49.9%	36.4%	7.2%	6.6%
Woman	43.4%	47.2%	4.5%	4.9%
Total	46.8%	41.4%	5.9%	5.8%

- I went from being religious to non-religious
- My belief/faith has not changed much
- I became religious after being non-religious
- I went from one religious orientation to another religious orientation

Survey June 2020
GAMAAN.org

GAMAAN's 2020 survey results show that half of the target population said to have switched in their lifetime from being religious to non-religious.

BEYOND SOME OF THE HEADLINE FINDINGS REGARDING SECULARISM, WHAT OTHER FINDINGS REALLY SURPRISED YOU?

MALEKI: One of the first surveys we did was replicating the referendum on the Islamic Republic on the fortieth anniversary of that referendum in 1979. That survey showed that 86% of those who voted for Rouhani in the 2017 presidential election, i.e. for a so-called reformist or moderate candidate, would vote "No" to the Islamic republic in a free referendum. This was an eye-opening finding as for many years the regime has propagated that people voting in elections is an indicator of its legitimacy and public support for the regime. I was very happy that, for the first time, a systematic study could open this black box.

TAMIMI ARAB: In another survey we understood that Iranians are extremely disappointed in the United States' hesitations to promote democracy in Iran and in the region. Think, for example, of the disastrous retreat from Afghanistan. A result that will baffle many in Europe is that, as a consequence, Trump, who is perceived to at least have bullied the ayatollahs, has been much more popular than Biden. On the other hand, the United States is viewed favorably by many Iranians: in a 2021 survey, 20% thought "very favorably" and 32% "somewhat favorably" about the U.S.

DOES THE CURRENT SITUATION MEAN AUTHORITIES WILL CRACK DOWN FURTHER ON NATIONAL INTERNET ACCESS – HOW WOULD GAMAAN DEAL WITH SUCH CHALLENGES?

MALEKI: Filtering and blocking the internet is an ongoing challenge for us, but the regime cannot fully shut down the internet. Right now we are dealing with a new situation because popular social media like Instagram and WhatsApp have been recently filtered in Iran. In response we are seeking to find new methods to reach people like using satellite TVs that are widely watched in Iran. On the other hand, new restrictions make VPN platforms like Psiphon more popular and used. All in all, we continue finding and utilising innovative approaches to contact people and collect their opinions.

DO YOU THINK THE LARGER RESEARCH ORGANISATIONS WILL ADOPT YOUR APPROACHES IN IRAN AND/OR OTHER COUNTRIES WHERE FREEDOM OF EXPRESSION IS RESTRICTED?

TAMIMI ARAB: I hope, especially, that larger research organisations start by giving up on the idea that it is possible to do phone surveys in authoritarian countries for measuring sensitive questions. Even if they do not adopt our approaches, which is also not that easy and requires a unique team and access, they should at least stop producing numbers such as that 95-99% of a country are X or Y. These totalising numbers only benefit the regimes and their apologists.

MALEKI: Our approach in GAMAAN has attracted the attention of scholars and other reputable pollsters like Pew and Gallup. We believe the issue of anonymity sampling is not only crucial for authoritarian contexts but also important in some cases in free societies. We know that even in free societies, some conventional polls could not measure people's real attitudes. The US 2016 election was a case in point: a remarkable share of voters did not reveal their honest opinions or did not participate in some phone surveys. Given these challenges, we hope to develop our methodology further to suggest alternative methods for measuring sensitive questions.

GIVEN THE CURRENT PROTESTS AND GOVERNMENT INTERVENTIONS WHAT IS THE MOST USEFUL ROLE YOUR ORGANISATION CAN PLAY, AND IN PARTICULAR WHAT AREAS OF RESEARCH WILL YOU BE FOCUSING ON IN THE NEXT 12 MONTHS?

MALEKI: We are going to conduct a new survey in the coming month to measure what Iranians think about the ongoing protests, which can be said to be a revolution. What do Iranians expect from the various groups that support the revolution? What do they expect from the international community? In 2023, we will also conduct the second wave of our religion survey, first conducted in 2020. From the outset, our mission was to measure the real opinions of Iranians and reveal them to both society and the world. This will help to defeat the regime's propaganda about what Iranians believe and demand, and it will help all actors to have a more realistic picture of Iran and its societal developments.

You can find out more about GAMAAN here.

You can see all the winners and finalists of the MRS Awards 2022 here.

This year MRS celebrated 28 Research Heroes

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

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