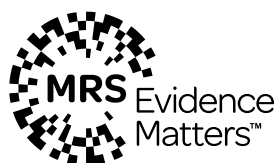

THE RESEARCH **LIVE** INDUSTRY REPORT 2019

INCLUDING THE NEW MRS LEAGUE TABLES



join the dots



“Now more than ever, online communities must offer both agile and immersive methodologies to deliver faster, more in-depth insights.

Our insight ecosystem enables us to do just that.”

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ACKNOWLEDGEMENTS

Market Research Society (MRS) would like to thank all contributors to this report. In particular, to David Barr for compiling the MRS League Tables every year and providing analysis, and David Cahn for undertaking the annual MRS Industry Survey and gender pay gap analysis, and Diane Bowers for preparing the 2018 GRBN Global Top 25.

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

INTRODUCTION

Jane Frost, chief executive, MRS



Welcome to the Research Live Industry Report 2019.

This report brings together multiple sources of intelligence including the MRS League Tables and highlights from the MRS Industry Survey. In addition, for the first time MRS has commissioned analysis of the Global Top 25 Report published by the Global Research Business Network.

The MRS League Tables are built on 2017 financial data submitted and collected in 2018; the data is focused solely on UK-based turnover and international work managed and invoiced from the UK. Financial data is inherently backward looking, which is why we have complemented these tables with the latest trends and analysis from the Research Live editorial team and industry experts.

The headline is that by our estimates the UK research supply industry grew by 3% in 2017 and has passed the £5bn mark (page 34). Never underestimate the value of a nice round memorable number, especially in these volatile times when we must continually promote and protect the sector.

The mood among UK businesses isn't optimistic, for the short term at least. Brexit has engendered widespread concern, particularly in a sector like ours which derives a lot of its revenue from international work. Diane Bowers' report (page 17) highlights the emphasis on international research in the UK's largest research companies which averaged 85.3% of their revenue from overseas in 2017.

MRS continues to lobby hard and highlight the value of the research industry to the UK government. This is to ensure that post-Brexit we retain our position as the second largest research industry in the world, with the highest per-capita expenditure on market research and insight (page 34). MRS members and non-members can access our Brexit advice on mrs.org.uk

There are other key indicators as to the health of an industry, beyond the purely financial. I'm very pleased to include David Cahn's analysis of the gender pay gap (page 36) which paints a picture of a sector with its own particular struggles, but with some beacons of best practice leading the way.

To round the report off in a positive direction we look at this year's winner of the Research Live award for Best Innovation (page 42). Streetbees offers a compelling vision for the future of the research sector where real-time consumer insight can help transform a business.

Thank you for taking the time to read this report – I hope you find it useful.

A handwritten signature in blue ink that reads "Jane Frost". The signature is written in a cursive style and is positioned above a horizontal line.

Jane Frost, CBE, chief executive, MRS

HIGHLIGHTS FROM THIS REPORT



5bn

£5.045BN
THE UK RESEARCH
SUPPLY INDUSTRY
GREW 3% IN 2017



£3.3bn

**TURNOVER OF TOP 100
INDIVIDUAL AGENCIES**
£3.294BN VERSUS
£3.026BN THE
PREVIOUS YEAR



6.5%

GROWTH
YEAR-ON-YEAR FOR
TOP 100 INDIVIDUAL
AGENCIES



+17.7%

**INCREASE IN MALE
AVERAGE HOURLY
EARNINGS COMPARED
TO FEMALES WORKING
IN RESEARCH SECTOR**



43.2%

**OF EU RESEARCH
OUTPUT IS GENERATED
FROM THE UK**



8

**OF THE GLOBAL TOP 25
ARE UK COMPANIES –
85.3% OF THEIR 2017
REVENUE CAME FROM
OUTSIDE THE UK**

MRS LEAGUE TABLES ANALYSIS

David Barr, league tables compiler

In 2017, the top 100 individual agencies generated a total turnover of £3.294bn which represents over 60% of the MRS estimate of the total industry size. Overall year-on-year growth within these 100 agencies was 6.5%. Sixty four agencies recorded growth, while 36 had declining turnover. The top 10 agencies accounted for 49.8% of total turnover in the table, and the top 20 accounted for 69.1%.

TOTAL TURNOVER AND GROWTH RATES OF TOP 100 INDIVIDUAL AGENCIES

	2015	2016	2017
TOTAL TURNOVER	£2.94bn	£3.093bn	£3.294bn
GROWTH RATE	7.2%	4%	6.5%

NUMBER OF TOP 100 INDIVIDUAL AGENCIES WITH GROWING/DECLINING TURNOVER

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

SCALE

Thousands of small suppliers with turnover below £5m, ranging from generalists to boutique specialists, provide high-quality work and excellent customer service. Also, the league tables 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 the Top 100 Individual Agencies.

INTERNATIONAL CONTEXT

1. UNITED STATES

The world's largest market research industry is in the United States. The second largest is the UK, disproportionately so when placed in the context of the size of the US economy. The US industry is only three times larger than the UK despite its GDP and population being five times higher. However, the US is a major investor in the UK-based industry. The turnover level for eligibility for entry in the MRS Top 50 Table of Consolidated Businesses is comparable to that for the AMA Gold Top 50 in the USA. 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 more substantial medium-sized businesses than the USA, and also a much more internationally-focused industry. Many of the largest groups in the USA (especially those which are US-owned and headquartered) serve predominantly the large domestic US market and have very low levels of non-US turnover. Not only are they minimal exporters, many have virtually no international or global capability. The UK retains its long-term status as a hub for management of international projects, and records the world's highest per-capita expenditure on market and social research and insight.

2. EUROPE

According to ESOMAR's Global Market Research Report, the UK is the largest supplier in Europe of research and insight, larger than Germany and France combined. The UK represents 43.2% of EU output and 40.8% of the wider European output.

3. ULTIMATE OWNERSHIP

The Table of the Top Consolidated Businesses focuses on concentration of ownership. Ownership of these UK-based businesses (including ultimate holding companies and majority private equity) is as follows: The UK: 31 / USA: 14 / Others: 5 (one each from Germany, France, Netherlands, Norway, Ireland).

COMPILATION METHODOLOGY AND ELIGIBILITY GENERAL

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

The MRS 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.

TABLE OF TOP 100 INDIVIDUAL AGENCIES

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

TABLE OF TOP 50 CONSOLIDATED BUSINESSES

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

SOURCES

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

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

Within the tables, the previous year's turnover is amended for some entries to replace the compiler's estimates with actual turnover subsequently reported; to include re-statements by auditors; and to ensure like-for-like comparative data. 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 distorted. 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 as in previous years.

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

MRS LEAGUE TABLES

TOP 100 INDIVIDUAL AGENCIES RANKED BY TURNOVER

2017 MRS LEAGUE TABLES, COMPILED NOVEMBER 2018

2017 RANKING NUMBER	CHANGE ON PREVIOUS RANKING	2016 RANKING NUMBER	COMPANY NAME	2017 (£M.)	2016 (£M.)	2015 (£M.)	% CHANGE ON PREVIOUS YEAR	GROWTH RANKING
1	=	1	Dunnhumby	253.297	254.379	248.296	-0.425%	65
2	=	2	Wood Mackenzie Research & Consulting	234.301	226.569	226.988	3.413%	51
3	▲	5	Gartner	200.379	174.966	156.244	14.525%	25
4	=	4	Ipsos MORI	193.700	177.300	172.500	9.250%	38
5	▼	3	Kantar TNS UK	189.012	184.880	191.623	2.235%	55
6	▲	8	Euromonitor	122.484	102.018	88.356	20.061%	17
7	▲	35	GlobalData	121.678	100.613	60.466	20.937%	15
8	▲	9	Mintel	115.226	95.858	84.658	20.205%	16
9	▼	7	GfK UK	105.588	103.291	129.151	2.224%	56
10	▼	6	AC Nielsen	105.500	113.919	122.769	-7.390%	78
11	▼	10	Kantar Millward Brown UK	87.500	92.192	100.136	-5.089%	76
12	▼	11	Ebiquity	87.376	83.569	73.874	4.556%	45
13	▲	17	IQVIA Solutions UK	74.436	43.038	36.217	72.954%	1
14	▲	19	Forrester Research	62.914	38.738	16.863	62.409%	3
15	▼	12	Teradata UK	60.901	70.087	90.906	-13.107%	90
16	▼	14	Kantar Media UK	60.100	59.071	57.079	1.742%	61
17	▼	13	Informa Telecoms & Media	59.954	60.935	63.122	-1.610%	69
18	▼	15	Lightspeed Research	55.060	47.632	41.582	15.595%	22
19	▼	18	Information Resources	43.663	41.844	39.957	4.347%	46
20	▼	16	Precise Media Monitoring	41.941	43.578	44.012	-3.756%	73
21	=	21	Research Now	38.283	34.509	34.843	10.936%	32
22	=	22	IDC	37.860	31.221	25.753	21.265%	14
23	▲	24	NatCen	33.106	29.998	32.933	10.361%	34
24	▼	20	MMR Research Worldwide	32.300	35.900	25.980	-10.028%	85
25	▼	23	Hall & Partners	30.234	30.589	28.681	-1.161%	68

Those in *italics* are estimated or partially estimated figures

Those marked '--' are new entrants

MRS LEAGUE TABLES

TOP 100 INDIVIDUAL AGENCIES RANKED BY TURNOVER (CONT.)

2017 MRS LEAGUE TABLES, COMPILED NOVEMBER 2018

2017 RANKING NUMBER	CHANGE ON PREVIOUS RANKING	2016 RANKING NUMBER	COMPANY NAME	2017 (£M.)	2016 (£M.)	2015 (£M.)	% CHANGE ON PREVIOUS YEAR	GROWTH RANKING
26	▼	25	Double Helix	30.000	29.000	28.000	3.448%	50
27	▲	28	The Research Partnership	27.517	22.579	21.828	21.870%	13
28	▼	27	YouGov	27.100	24.960	22.900	8.574%	39
29	=	29	Cello Health Insight	24.734	21.817	21.158	13.370%	27
30	▼	26	Toluna	22.805	25.046	20.591	-8.948%	83
31	▲	36	WorldOne Research	20.563	17.940	16.450	14.621%	24
32	=	32	Flamingo Research	20.397	19.033	21.746	7.167%	41
33	▲	40	IHS Markit Economics	18.812	14.159	12.445	32.862%	7
34	▼	33	Frost & Sullivan	18.800	18.468	18.280	1.798%	60
35	▼	31	Confirmit	17.957	19.754	18.351	-9.097%	84
36	▼	34	Future Thinking	17.588	19.105	17.416	-7.940%	79
37	▲	47	Kynetec UK	17.009	12.243	13.923	38.928%	4
38	▼	37	MaritzCX	16.793	16.463	16.380	2.004%	57
39	▲	41	The Gallup Organisation	15.639	13.428	11.507	16.466%	20
40	▼	38	Hay Group Insight	15.150	15.100	15.050	0.331%	64
41	▲	42	Incite Marketing Planning	14.983	12.996	12.926	15.289%	23
42	▲	44	Prescient Healthcare	13.574	12.716	10.974	6.747%	43
43	▲	45	Promise Communispace	13.469	12.701	12.653	6.047%	44
44	▼	43	BDRC Continental	13.148	12.752	13.302	3.105%	53
45	▲	46	Populus	13.105	12.560	10.653	4.339%	47
46	▲	53	Adelphi International Research	12.878	11.098	9.953	16.039%	21
47	--	--	Nielsen Book Services	12.568	13.726	13.457	-8.437%	81
48	▲	61	Join the Dots	12.052	9.798	7.760	23.005%	12
49	▲	69	Kantar Retail	11.899	10.603	8.820	12.223%	31
50	▲	59	Firefish	11.860	10.030	11.237	18.245%	19

Those in *italics* are estimated or partially estimated figures

Those marked '--' are new entrants

MRS LEAGUE TABLES

TOP 100 INDIVIDUAL AGENCIES RANKED BY TURNOVER (CONT.)

2017 MRS LEAGUE TABLES, COMPILED NOVEMBER 2018

2017 RANKING NUMBER	CHANGE ON PREVIOUS RANKING	2016 RANKING NUMBER	COMPANY NAME	2017 (£M.)	2016 (£M.)	2015 (£M.)	% CHANGE ON PREVIOUS YEAR	GROWTH RANKING
51	=	51	Defaqto	11.653	11.551	13.247	0.883%	63
52	▲	72	Concentra Analytics	11.638	8.452	7.213	37.695%	5
53	▼	39	Shoppertrak	11.166	14.437	12.969	-22.657%	98
54	▲	68	B2B International	11.009	8.625	8.227	27.641%	8
55	▼	54	Datamonitor	10.966	10.678	11.653	2.697%	54
56	▲	63	Added Value	10.828	9.620	10.356	12.557%	29
57	▼	52	2CV	10.812	11.228	9.865	-3.705%	72
58	▲	70	Basis Research	10.696	8.507	7.461	25.732%	10
59	▲	73	PwC Research	10.350	8.350	8.300	23.952%	11
60	▼	58	MARU/edr	10.291	10.095	9.126	1.942%	59
61	--	--	Nielsen Sports	10.250	9.524	7.899	7.623%	40
62	▼	49	Market Force Information	10.238	11.610	11.715	-11.817%	87
63	▼	55	Avention UK	10.181	10.657	10.788	-4.467%	75
64	▼	50	ORC International	9.965	11.689	12.621	-14.749%	94
65	▼	48	The Planning Shop International	9.281	12.053	9.633	-22.998%	99
66	▼	57	ICM Research Unlimited	8.914	10.171	9.963	-12.359%	89
67	▼	65	Cello Bright Blue	8.883	9.491	9.020	-6.406%	77
68	▲	75	Harris Interactive	8.808	7.944	7.502	10.876%	33
69	▼	64	Strategy Analytics	8.750	9.588	10.387	-8.740%	82
70	▼	60	Quadrangle	8.539	9.891	10.678	-13.669%	91
71	▼	62	Walnut Unlimited	8.505	9.661	10.618	-11.966%	88
72	▲	79	NPD Group	8.336	7.600	6.460	9.684%	37
73	▼	71	System1 Research	8.175	8.478	8.622	-3.574%	71
74	▼	66	KPMG Nunwood Consulting	7.963	9.376	5.706	-15.070%	95
75	▼	67	Illuminas	7.950	8.649	8.199	-8.082%	80

Those in *italics* are estimated or partially estimated figures

Those marked '--' are new entrants

MRS LEAGUE TABLES

TOP 100 INDIVIDUAL AGENCIES RANKED BY TURNOVER (CONT.)

2017 MRS LEAGUE TABLES, COMPILED NOVEMBER 2018

2017 RANKING NUMBER	CHANGE ON PREVIOUS RANKING	2016 RANKING NUMBER	COMPANY NAME	2017 (£M.)	2016 (£M.)	2015 (£M.)	% CHANGE ON PREVIOUS YEAR	GROWTH RANKING
76	▼	56	ComScore	7.846	10.532	11.048	-25.503%	100
77	▲	88	ABA Market Research	7.688	6.727	7.347	14.286%	26
78	▼	76	Tti Global Research	7.550	7.850	8.500	-3.822%	74
79	▲	92	Sparkler	7.462	5.871	4.801	27.099%	9
80	▲	84	Watermelon Research	7.330	7.048	6.069	4.001%	48
81	▲	86	IFF Research	7.278	6.812	6.667	6.841%	42
82	=	82	Network Research & Marketing	7.153	7.234	7.159	-1.120%	67
83	▲	93	Pulsar	7.141	6.007	5.786	18.878%	18
84	▼	74	Nielsen Netratings UK	7.121	8.323	8.267	-14.442%	93
85	▲	87	BMG Research	7.001	6.742	6.894	3.842%	49
86	▼	85	Verve	6.923	6.844	5.735	1.154%	62
87	▼	78	Facts International	6.857	7.643	7.528	-10.284%	86
88	▲	91	Simpson Carpenter	6.730	6.120	5.877	9.967%	36
89	=	89	Jigsaw Research	6.650	6.523	6.027	1.947%	58
90	--	--	MetrixLab UK	6.581	3.951	5.115	66.565%	2
91	▼	80	Survey Sampling UK	6.500	7.583	5.495	-14.282%	92
92	▲	96	Northstar Research Partners	6.100	5.416	4.860	12.629%	28
93	▲	97	Promar International	5.900	5.363	5.365	10.013%	35
94	▼	83	Perspective Research Services	5.712	7.123	9.112	-19.809%	97
95	▼	94	ESA	5.686	5.741	5.896	-0.958%	66
96	--	--	Merkle Aquila Insight	5.657	4.153	2.200	36.215%	6
97	▼	90	ICM Direct	5.246	6.327	6.096	-17.086%	96
98	▲	100	Trinity McQueen	5.115	4.951	4.484	3.312%	52
99	▼	98	Truth Consulting	5.100	5.256	4.618	-2.968%	70
100	--	--	Springboard Research	5.034	4.473	4.102	12.542%	30
TOTAL				3294.701	3093.307	2974.025		

Those in *italics* are estimated or partially estimated figures

Those marked '--' are new entrants

MRS LEAGUE TABLES

TOP 20 FASTEST-GROWING INDIVIDUAL AGENCIES

2017 MRS LEAGUE TABLES, COMPILED NOVEMBER 2018

2017 RANKING	GROWTH RATE	COMPANY NAME	2017 (£M.)	2016 (£M.)
1	72.954%	IQVIA Solutions UK	74.436	43.038
2	66.565%	MetrixLab UK	6.581	3.951
3	62.409%	Forrester Research	62.914	38.738
4	38.928%	Kynetec UK	17.009	12.243
5	37.695%	Concentra Analytics	11.638	8.452
6	36.215%	Merkle Aquila Insight	5.657	4.153
7	32.862%	IHS Markit Economics	18.812	14.159
8	27.641%	B2B International	11.009	8.625
9	27.099%	Sparkler	7.462	5.871
10	25.732%	Basis Research	10.696	8.507
11	23.952%	PwC Research	10.350	8.350
12	23.005%	Join the Dots	12.052	9.798
13	21.870%	The Research Partnership	27.517	22.579
14	21.265%	IDC	37.860	31.221
15	20.937%	GlobalData	121.678	100.613
16	20.205%	Mintel	115.226	95.858
17	20.061%	Euromonitor	122.484	102.018
18	18.878%	Pulsar	7.141	6.007
19	18.245%	Firefish	11.860	10.030
20	16.466%	The Gallup Organisation	15.639	13.428

Those in *italics* are estimated or partially estimated figures

MRS LEAGUE TABLES

TOP 50 CONSOLIDATED BUSINESSES RANKED BY TURNOVER

2017 MRS LEAGUE TABLES, COMPILED NOVEMBER 2018

2017 RANKING NUMBER	CHANGE ON PREVIOUS RANKING	2016 RANKING NUMBER	COMPANY NAME	2017 (£M.)	2016 (£M.)	2015 (£M.)	% CHANGE ON PREVIOUS YEAR	GROWTH RANKING
1	=	1	Kantar (WPP)	456.340	447.576	453.608	1.958%	33
2	=	2	Dunnhumby	253.297	254.379	248.296	-0.425%	41
3	=	3	Wood Mackenzie Research & Consulting	234.301	226.569	226.988	3.413%	30
4	▲	5	Gartner	200.379	174.966	156.244	14.525%	19
5	▼	4	Ipsos MORI	193.700	177.300	172.500	9.250%	22
6	=	6	Nielsen	139.313	153.265	160.559	-9.103%	47
7	▲	8	Euromonitor	122.484	102.018	88.356	20.061%	14
8	▲	33	GlobalData	121.678	100.613	60.466	20.937%	12
9	=	9	Mintel	115.226	95.858	84.658	20.205%	13
10	▼	7	GfK UK	105.588	103.291	129.151	2.224%	31
11	=	11	Ebiquity	87.376	83.569	73.874	4.556%	27
12	▼	10	Omnicom/DAS	86.259	85.474	82.666	0.918%	36
13	▲	15	IQVIA Solutions UK	74.436	43.038	36.217	72.954%	1
14	▼	12	Informa	70.920	71.613	74.775	-0.968%	42
15	▲	18	Forrester Research	62.914	38.738	16.863	62.409%	2
16	▼	13	Teradata UK	60.901	70.087	90.906	-13.107%	48
17	▼	16	Cello Group	45.094	42.842	41.365	5.257%	26
18	▼	17	Information Resources	43.663	41.844	39.957	4.347%	28
19	▼	14	MMR Group	43.400	46.300	33.500	-6.263%	43
20	▼	19	Research Now	38.283	34.509	34.843	10.936%	20
21	▼	20	IDC	37.860	31.221	25.753	21.265%	11
22	▼	21	NatCen	33.106	29.998	32.933	10.361%	21
23	▼	22	Double Helix	30.000	29.000	28.000	3.448%	29
24	▼	23	BDRC Group	27.815	27.918	26.959	-0.369%	40
25	▲	27	The Research Partnership	27.517	22.579	21.828	21.870%	10

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MRS LEAGUE TABLES

TOP 50 CONSOLIDATED BUSINESSES RANKED BY TURNOVER (CONT.)

2017 MRS LEAGUE TABLES, COMPILED NOVEMBER 2018

2017 RANKING NUMBER	CHANGE ON PREVIOUS RANKING	2016 RANKING NUMBER	COMPANY NAME	2017 (£M.)	2016 (£M.)	2015 (£M.)	% CHANGE ON PREVIOUS YEAR	GROWTH RANKING
26	=	26	YouGov	27.100	24.960	22.900	8.574%	23
27	▼	25	Toluna	22.805	25.046	20.591	-8.948%	45
28	▼	24	Digital Unlimited Group	22.665	26.159	26.667	-13.357%	49
29	▲	34	WorldOne Research	20.563	17.940	16.450	14.621%	18
30	▼	29	Chime Communications	20.300	20.217	19.011	0.411%	38
31	▲	39	IHS Markit Economics	18.812	14.159	12.445	32.862%	5
32	▼	31	Frost & Sullivan	18.800	18.468	18.280	1.798%	35
33	▼	30	Confirmit	17.957	19.754	18.351	-9.097%	46
34	▼	32	Future Thinking	17.588	19.105	17.416	-7.940%	44
35	▲	43	Kynetec UK	17.009	12.243	13.923	38.928%	3
36	▼	35	MaritzCX	16.793	16.463	16.380	2.004%	32
37	▼	36	Populus Group	16.790	15.804	13.489	6.239%	25
38	▲	40	The Gallup Organisation	15.639	13.428	11.507	16.466%	16
39	▼	37	Hay Group Insight	15.150	15.100	15.050	0.331%	39
40	▲	41	Incite Marketing Planning	14.983	12.996	12.926	15.289%	17
41	▲	42	Prescient Healthcare	13.574	12.716	10.974	6.747%	24
42	--	--	Join the Dots	12.052	9.798	7.760	23.005%	9
43	▲	50	Firefish	11.860	10.030	11.237	18.245%	15
44	▲	46	Defaqto	11.653	11.551	13.247	0.883%	37
45	--	--	Concentra Analytics	11.638	8.452	7.213	37.695%	4
46	▼	38	Shoppertrak	11.166	14.437	12.969	-22.657%	50
47	--	--	B2B International	11.009	8.625	8.227	27.641%	6
48	--	--	Basis Research	10.696	8.507	7.461	25.732%	7
49	--	--	PwC Research	10.350	8.350	8.300	23.952%	8
50	▼	49	MARU/edr	10.291	10.095	9.126	1.942%	34

Those in *italics* are estimated or partially estimated figures

Those marked '--' are new entrants

MRS LEAGUE TABLES

TOP 20 FASTEST-GROWING BUSINESSES

2017 MRS LEAGUE TABLES, COMPILED NOVEMBER 2018

2017 RANKING	GROWTH RATE	COMPANY NAME	2017 (£M.)	2016 (£M.)
1	72.954%	IQVIA Solutions UK	74.436	43.038
2	62.409%	Forrester Research	62.914	38.738
3	38.928%	Kynetec UK	17.009	12.243
4	37.695%	Concentra Analytics	11.638	8.452
5	32.862%	IHS Markit Economics	18.812	14.159
6	27.641%	B2B International	11.009	8.625
7	25.732%	Basis Research	10.696	8.507
8	23.952%	PwC Research	10.350	8.350
9	23.005%	Join the Dots	12.052	9.798
10	21.870%	The Research Partnership	27.517	22.579
11	21.265%	IDC	37.860	31.221
12	20.937%	GlobalData	121.678	100.613
13	20.205%	Mintel	115.226	95.858
14	20.061%	Euromonitor	122.484	102.018
15	18.245%	Firefish	11.860	10.030
16	16.466%	The Gallup Organisation	15.639	13.428
17	15.289%	Incite Marketing Planning	14.983	12.996
18	14.621%	WorldOne Research	20.563	17.940
19	14.525%	Gartner	200.379	174.966
20	10.936%	Research Now	38.283	34.509

Those in *italics* are estimated or partially estimated figures

NOTES ON LEAGUE TABLES

TOP 100 INDIVIDUAL AGENCIES

Entry 14: Forrester Research. The reported turnover reflects the new position of Forrester Research Ltd as the international operational headquarters for Forrester Research Inc., including transfer to London of business previously headquartered in Switzerland.

Entry 15: Teradata UK. The reported result reflects the sale of the marketing applications division during 2016.

Entry 21: Research Now. Merged during 2018 with SSI.

Entry 55: Datamonitor. This is principally Datamonitor Healthcare following divestment of other divisions to Progressive Digital Media which became GlobalData.

Entry 59: PwC Research. Formerly PwCr2i research to insight. Name change and result reflect the acquisition mid-2017 of Optimisa Research.

Entry 73: System1 Research. Formerly Brainjuicer. The reported result reflects a 15-month trading period as part of a change of financial year-end.

Entry 79: Sparkler. The company was sold in May 2018 to management consultancy PA Consulting Group.

Entry 90: MetrixLab is a company within the Macromill Group, a global online and consumer insights and analytics company, headquartered in Tokyo.

Entry 91: Survey Sampling UK. Merged during 2018 with Research Now.

Entry 94: Perspective Research Services. The reported turnover reflects the retention within Perspective of 'traditional' data collection, and the transfer of digital data collection to Alligator, a separate business within BDRC Group.

Entry 99: Truth Consulting: Part of the Instinct Partners Group of companies, a business communications consultancy group.

TOP 50 CONSOLIDATED BUSINESSES

Entry 1: Kantar is the Data Investment Management Division of WPP plc. The Kantar turnover incorporates Kantar TNS, Kantar Millward Brown, Kantar Media, Kantar Retail, Lightspeed Research, Added Value, and Precise Media Monitoring. Its businesses are grouped with the Kantar prefix under twelve operating brands – Added Value, Futures, Health, IMRB, Lightspeed, Media, Millward Brown, Public, Retail, TNS, Vermeer, and Worldpanel.

Entry 2: Dunnhumby is wholly owned by Tesco plc.

Entry 3: Wood Mackenzie Research & Consulting. Total turnover reflects a UK-based business delivering its services via the internet to a global client base in the energy, mining, and metals industries. Acquired in 2015 by US-based energy sector data firm Verisk Analytics.

Entry 6: Nielsen includes AC Nielsen, Nielsen Media Research, Nielsen Netratings, Nielsen Book Services, and Nielsen Sports.

Entry 8: GlobalData. Formerly Progressive Digital Media, which acquired GlobalData Holdings Ltd in 2016, and in 2017 changed the name of the combined group to GlobalData plc. Within a diverse portfolio its primary focus is on healthcare, consumer, and information/communications technology.

Entry 11: Ebiquity consists of three divisions – Market Intelligence, Media Value Measurement, and Marketing Performance Evaluation.

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

Entry 13: IQVIA Solutions UK. Formerly IMS Health. The reported turnover for 2017 reflects the consolidation into this company of the former IMS Hospital Group, IMS Information Solutions, and IMS Technology Solutions. In October 2016, IMS Health (a global provider of information, research, and technology services for the healthcare industry) merged with Quintiles (a contract research organisation for the pharmaceutical, biotechnology, and medical device industries). In November 2017, Quintiles IMS changed its name to IQVIA.

Entry 14: Informa includes Datamonitor and Informa Telecoms & Media (formerly Ovum Europe).

Entry 17: Cello Group includes 2CV, Cello Health Insight, and Cello Bright Blue (formerly RS Consulting).

Entry 19: MMR Group includes Healthcare Research Worldwide and MMR Research Worldwide.

Entry 23: Double Helix is part of McCann Health within Interpublic, and contributes research to the McCann Health Consultancy launched during 2016.

Entry 24: BDRC Group includes BDRC Continental, ESA, Perspective Research Services, Alligator Research, and Viewpoint. In mid-2018, BDRC Group was acquired by French research group BVA.

Entry 28: Digital Unlimited Group (formerly Creston until acquisition by Dbay Advisors). Within its research and insights division are Walnut Unlimited (formerly Marketing Sciences), ICM Unlimited, and ICM Direct.

Entry 30: Chime Communications includes Chime Insight & Engagement (incorporating Facts International, Opinion Leader, and Watermelon Research), plus research turnover generated by other agencies within the group. In 2018 Watermelon Research (formally CIE) was transferred to join Tree London to be managed in the VCCP division within Chime.

Entry 35: Kynetec UK. In the final quarter of 2017, Kynetec acquired Market Probe Europe and Market Probe Agriculture & Animal Health.

Entry 37: Populus Group includes Populus and Populus Data Solutions.

Entry 46: Shoppertrak (formerly Footfall following acquisition by Tyco from Experian). Turnover initially declined because of the formation of a separate new subsidiary in Germany to handle trade with European clients. Following a change to financial year-end, the 2016 result represented a 16-month trading period. The 2017 figure is a 12-month result.

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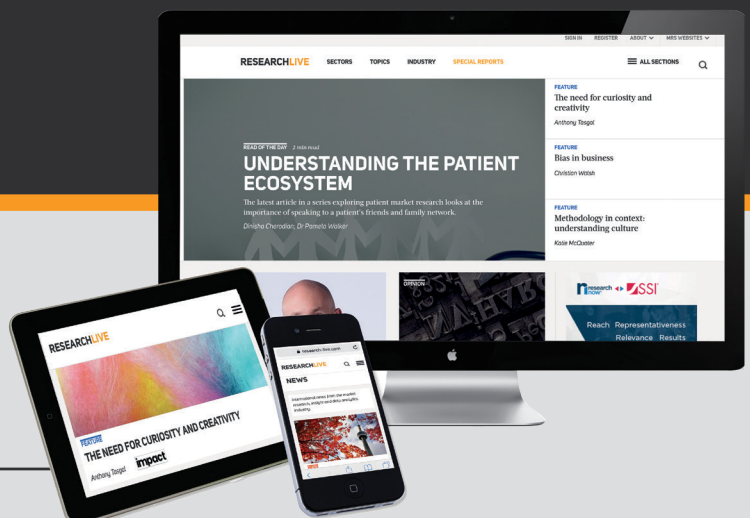
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RESEARCHLIVE

INTERNATIONAL OUTLOOK: ANALYSIS OF 2018 GRBN GLOBAL TOP 25

Exclusive to this report, Diane Bowers analyses the results of the top 25 league table of global research organisations conducted by the Global Research Business Network (GRBN).

For the top 25 global market research, data analytics and insights companies listed in this year's report (pages 22 and 23) the annual revenue increased by \$1.5bn in 2017 versus 2016. The total 2017 revenue is \$26.2bn versus \$24.8bn in 2016, a growth rate of 5.9% (3.8% when adjusted for inflation). However, it is important to note that one company in this year's global top 25 achieved a 33% growth rate in 2017, which significantly inflates the growth rate for all of the 25 companies. If you correct for this outlier, then the growth rate in 2017 was 3.7%, 0.9% lower than 2016's growth rate of 4.6%.

INTERNATIONAL OUTLOOK: ANALYSIS OF 2018 GRBN GLOBAL TOP 25

COUNTRIES AND CURRENCIES (FIG. 1)

The currency exchange rate fluctuation between 2017 and 2016 had a mixed effect on the growth rate in 2017. The Global Top 25 companies submit their annual revenue in their 'parent' or home country currency. These figures are converted to US dollars based on the average year currency exchange rates provided by the US Federal Reserve Bank. In 2017 the currency exchange rate against the US dollar had a negative impact on the British pound and a slightly negative impact on the Japanese yen. The currency exchange rate between the euro and the US dollar was relatively the same from 2016 to 2017.

The British pound is the home country currency for one-third of the Global Top 25 companies. The eight British organisations account for the highest percentage of total 2017 revenue, exceeding the US contingent of 12 organisations by almost \$2.7bn. The eight UK organisations totalled about \$12.2bn (46.4% of total 2017 revenue for all of the top 25 organisations), while the US organisations' total 2017 revenue of \$9.5bn represented 36.2% of the total 2017 revenue for the Global Top 25.

The United Kingdom contingent includes three top 10 companies, beginning with no.1 and no.2 on the list, Nielsen and Kantar, as well as no.9 dunnhumby. The other UK companies are no.11 Wood MacKenzie, no.16 Cello Health, no.19 Euromonitor International, no.21 Mintel, and no.24 YouGov.

Four of the 12 companies claiming the US dollar as their home currency are included in the Top 10: no.3 IQVIA, no.4 Gartner Research, no.7 IRI (Information Resources), and no.8 Westat. The other US companies are: no.12 comScore, no.13 The NPD Group, no.15 ICF, no.17 Forrester Research Services, no.18 DRG (Decision Resources Group), no.22 MaritzCX, no.23 LRW (Lieberman Research Worldwide), and no.25 Informa Financial Intelligence.

The euro represents 14.5% of the total 2017 global revenue, with 8.2% of that revenue coming from France, including no.5 on the top 10, Ipsos, and no.20 BVA. Germany's 6.3% of the global revenue is represented by one company, GfK, no.6 on the top 10 list.

The Japanese yen represents 2.9% of the 2017 global revenue, and includes two companies, beginning with no.10 on the top 10 list, INTAGE Holdings, along with #14 Macromill Group.

INTERNATIONAL OUTLOOK: ANALYSIS OF 2018 GRBN GLOBAL TOP 25

FIG. 1: COUNTRIES AND CURRENCIES

CURRENCY	NUMBER OF COMPANIES (% OF TOTAL)	2017 GLOBAL REVENUE (% OF TOTAL)	PERCENT CHANGE FROM 2016	DOMESTIC REVENUE FROM HOME COUNTRY (% OF TOTAL 2017 GLOBAL REVENUE)	INTERNATIONAL REVENUE FROM OUTSIDE HOME COUNTRY (% OF TOTAL 2017 GLOBAL REVENUE)	2016 GLOBAL REVENUE (% OF TOTAL)
British pound United Kingdom	8 (32%)	\$12,181.4 (46.4%)	3.8%	\$1,796.5 (14.7%)	\$10,384.9 (85.3%)	\$11,733.5 (47.4%)
US dollar United States	12 (48%)	\$9,506.5 (36.2%)	12.0%	\$5,570.8 (58.6%)	\$3,935.7 (41.4%)	\$8,490.8 (34.2%)
Euro	3 (12%)	\$3,793.5 (14.5%)	-0.5%	\$626.0 (16.5%)	\$3,167.5 (83.5%)	\$3,810.8 (15.4%)
France	2 (8%)	\$2,143.5 (8.2%)	1.0%	\$226.0 (10.5%)	\$1,917.5 (89.5%)	\$2,133.6 (8.6%)
Germany	1 (4%)	\$1,650.0 (6.3%)	-1.6%	\$400.0 (24.2%)	\$1,250.0 (75.8%)	\$1,677.2 (6.8%)
Yen Japan	2 (8%)	\$767.5 (2.9%)	3.6%	\$645.3 (84.1%)	\$122.2 (15.9%)	\$740.7 (3.0%)
TOTALS	25	\$26,248.9	5.9%	\$8,638.6 (32.9%)	\$17,610.3 (67.1%)	\$24,775.8

“FOR THE TOP 25 GLOBAL MARKET RESEARCH, DATA ANALYTICS AND INSIGHTS COMPANIES LISTED IN THIS YEAR’S REPORT THE ANNUAL REVENUE INCREASED BY \$1.5BN IN 2017 VERSUS 2016.”

INTERNATIONAL OUTLOOK: ANALYSIS OF 2018 GRBN GLOBAL TOP 25

HOW GLOBAL? (FIG. 2)

Many of the global top 25 companies focus their business within their home country. This is true even for some of the largest companies on the list. Sixteen companies in the Global Top 25 (including numbers 7 through to 10 – IRI, Westat, dunnhumby, and INTAGE Holdings) derive more than 60% of their annual revenue from their home country. Even so, the revenue generated by the global top 25 companies outside their home countries is more than twice the revenue they generate in their home countries.

DOMESTIC (HOME COUNTRY) VS. INTERNATIONAL (OUTSIDE HOME COUNTRY)

When you look at domestic vs. international revenue by country, the Global Top 25 Report supports the MRS League Tables commentary that the US research industry is not as internationally-focused. While the sample size is small, those companies on this year's Global Top 25 list based in the United Kingdom, France, and Germany

derived more than 75% of their 2017 revenue from international research, compared to an average of about 41% for international research from US companies. The two companies from France – Ipsos and BVA – registered the highest percentage of revenue from international research averaging 89.5%. The UK contingent of eight companies in the Global Top 25 derived 85.3% of their 2017 revenue from outside the UK and GfK realised 75.8% of its 2017 revenue from outside of Germany.

While much lower than the UK, France, and Germany, the 41.4% average 2017 international revenue for the 12 US companies in this year's Global Top 25 Report far exceeded the international research component registered by Japan's two companies in the global top 25 list. Japan's two Tokyo companies, INTAGE Holdings and Macromill Group, together derived only 15.9% of their 2017 annual revenues from international research.

FIG. 2: COUNTRY STATISTICS

COUNTRY	NUMBER OF COMPANIES (% OF TOTAL)	TOTAL GLOBAL REVENUE	DOMESTIC REVENUE (HOME COUNTRY) (% OF TOTAL)	INTERNATIONAL REVENUE (OUTSIDE HOME COUNTRY) (% OF TOTAL)	RESEARCH-ONLY FULL-TIME EMPLOYEES	AVERAGE NUMBER OF COUNTRIES WITH OFFICES
United Kingdom	8	\$12,181.4	\$1,796.5 (14.7%)	\$10,384.9 (85.3%)	84,216	39
United States	12	\$9,506.5	\$5,570.8 (58.6%)	\$3,935.7 (41.4%)	80,579	26
France	2	\$2,143.5	\$226.0 (10.5%)	\$1,917.5 (89.5%)	17,464	49
Germany	1	\$1,650.0	\$400.0 (24.2%)	\$1,250.0 (75.8%)	12,990	74
Japan	2	\$767.5	\$645.3 (84.1%)	\$122.2 (15.9%)	4,527	11

INTERNATIONAL OUTLOOK: ANALYSIS OF 2018 GRBN GLOBAL TOP 25

PORTFOLIO OF SERVICES

Reading through the profiles of the Global Top 25 companies confirms that their services are expanding and changing. Most businesses are vested in online research, panel research, social media measurement, data analytics, and customer experience. The Global Top 25 organisations are increasing their focus on and investment in social media, predictive analytics, data visualisation, and enterprise feedback management, among other emerging sub-disciplines that are being studied by Michael Brereton and the Research Transformed Collaborative at Michigan State University in the US, by GRBN and its member national associations around the world, especially the Market Research Society (MRS) in the UK, and by ESOMAR and other international organisations.

These Global Top 25 companies show that syndicated and tracking studies, along with the measurement of audiences, consumer purchases and behaviour, as well as subscriptions and contracts for research and data analytics products and services on industries, trends, media, marketing, etc. are moving research expenditure into the client's 'essential, must have' budget, rather than the discretionary category.

Please provide your comments, suggestions, and guidance to me, Diane Bowers, as well as to the Global Research Business Network (GRBN), and, especially, to the Market Research Society (MRS), which sponsored this special edition of the GRBN Global Top 25 Report for 2018.

METHODOLOGY

With the help of the GRBN, which includes the national research associations in over 40 countries around the world, invitations are sent out to research and data analytics firms with estimated revenue of more than \$75m. We ask for revenue information for the prior calendar year and for the year preceding that, in order to assess the growth rate. Other company data is also requested, including a description of the company's management, services, specialisations, etc. The rate of growth from year to year has been adjusted to account for revenue gains or losses from acquisitions or divestitures. Verification of revenue is required of each private firm for ranking by a third party, usually it's the outside accounting firm. For further information, contact Diane Bowers at dianebowersadvisorysvcs@gmail.com.

Diane Bowers is a consultant to research, insights, and data analytics businesses and industry associations, including GRBN.

About GRBN

GRBN, the Global Research Business Network, connects 45 research associations and over 3500 research businesses on six continents.

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THE 2018 GRBN GLOBAL TOP 25

GLOBAL RANK 2018	GLOBAL RANK 1017	ORGANISATION	YEAR FOUNDED	HEADQUARTERS	HOME COUNTRY	RESEARCH ONLY FULL-TIME EMPLOYEES
1	1	Nielsen Holdings plc***	1923	London	United Kingdom	46,000
2	2	Kantar***	1993	London	United Kingdom	30,000
3	3	IQVIA*	2016	Danbury, CT; Durham, NC	U.S.	55,000
4	--	Gartner Research*	1972	Stamford, CT	U.S.	10,400
5	4	Ipsos SA*	1975	Paris	France	16,660
6	5	GfK*	1934	Nuremberg	Germany	12,990
7	6	IRI (Information Resources)	1979	Chicago, IL	U.S.	5,000
8	7	Westat	1963	Rockville, MD	U.S.	1,900
9	10	dunnhumby***	2001	London	United Kingdom	2,300
10	9	INTAGE Holdings Inc.***	1960	Tokyo	Japan	2,527
11	8	Wood MacKenzie***	1973	Edinburgh	United Kingdom	1,337
12	--	comScore	1999	Reston, VA	U.S.	1,700
13	11	The NPD Group	1966	Port Washington, NY	U.S.	1,650
14	12	Macromill Group*	2000	Tokyo	Japan	2,000
15	13	ICF	1967	Fairfax, VA	U.S.	1,500
16	25	Cello Health plc***	2004	London	United Kingdom	472
17	--	Forrester Research Services*	1983	Cambridge, MA	U.S.	515
18	15	Decision Resources Group (DRG)*	1990	Burlington, MA	U.S.	1,000
19	--	Euromonitor International***	1972	London	United Kingdom	2,100
20	16	BVA	1970	Balma	France	804
21	18	Mintel***	1972	London	United Kingdom	1,200
22	17	MaritzCX	1973	Lehi, UT	U.S.	824
23	20	Lieberman Research Worldwide (LRW)	1973	Los Angeles, CA	U.S.	550
24	21	YouGov**	2000	London	United Kingdom	807
25	--	Informa Financial Intelligence	2016	Boston, MA	U.S.	540
						199,776

† Data are represented in millions of U.S. dollars

* Some or all figures are not made available by this company so instead are based on research and estimation by the Report author

** 2017 currency exchange rate from British Pounds to US Dollars deflated the growth rate percentage

*** Fiscal year ended March 31, 2017

TOTAL NUMBER OF COUNTRIES WITH OFFICES AND WHOLLY-OWNED SUBSIDIARIES	2017 RESEARCH REVENUE					2016 RESEARCH REVENUE		
	GLOBAL RESEARCH REVENUE†	PERCENT CHANGE FROM 2016	REVENUE FROM HOME COUNTRY†	REVENUE FROM OUTSIDE HOME COUNTRY†	PERCENT OF GLOBAL REVENUE FROM OUTSIDE HOME COUNTRY†	REVENUE FROM HOME COUNTRY†	REVENUE FROM OUTSIDE HOME COUNTRY†	GLOBAL RESEARCH REVENUE†
106	\$6,572.0	4.2%	\$179.6	\$6,392.4	97.3%	\$207.8	\$6,101.2	\$6,309.0
100	\$3,995.0	3.8%	\$588.2	\$3,406.8	85.3%	\$606.7	\$3,240.3	\$3,847.0
105	\$3,465.0	5.0%	\$1,430.0	\$2,035.0	58.7%	\$1,358.0	\$1,943.0	\$3,301.0
100	\$2,471.3	33.1%	\$1,433.2	\$1,038.1	42.0%	\$1,077.1	\$779.9	\$1,857.0
88	\$1,974.0	1.0%	\$131.0	\$1,843.0	93.4%	\$133.8	\$1,828.2	\$1,962.0
74	\$1,650.0	-1.6%	\$400.0	\$1,250.0	75.8%	\$408.0	\$1,269.2	\$1,677.2
9	\$1,149.4	12.0%	\$733.4	\$416.0	36.2%	\$639.2	\$387.5	\$1,026.7
6	\$557.5	9.0%	\$551.1	\$6.4	1.1%	\$500.7	\$10.8	\$511.5
29	\$458.0	-1.9%	\$326.5	\$131.5	28.7%	\$344.8	\$122.2	\$467.0
9	\$450.5	2.0%	\$417.3	\$33.2	7.4%	\$410.1	\$31.5	\$441.6
20	\$444.7	--	\$302.0	\$142.7	32.1%	\$307.1	\$135.7	\$442.8
23	\$403.5	1.0%	\$332.3	\$71.2	17.6%	\$316.8	\$82.7	\$399.5
25	\$382.4	12.1%	\$289.4	\$93.0	24.3%	\$259.0	\$82.0	\$341.0
13	\$317.0	6.0%	\$228.0	\$89.0	28.1%	\$214.6	\$84.5	\$299.1
12	\$228.5	2.3%	\$170.6	\$57.9	25.3%	\$163.7	\$59.6	\$223.3
3	\$218.2	-2.6%	\$58.1	\$160.1	73.4%	\$58.1	\$165.9	\$224.0
10	\$216.5	1.0%	\$166.7	\$49.8	23.0%	\$165.7	\$49.5	\$215.2
6	\$180.8	1.6%	\$129.5	\$51.3	28.4%	\$128.0	\$50.0	\$178.0
14	\$180.0	12.5%	\$157.9	\$22.1	12.3%	\$138.3	\$21.7	\$160.0
9	\$169.5	-1.2%	\$95.0	\$74.5	44.0%	\$97.0	\$74.6	\$171.6
14	\$169.0	12.7%	\$148.5	\$20.5	12.1%	\$129.9	\$20.1	\$150.0
5	\$167.3	-1.1%	\$124.4	\$42.9	25.6%	\$128.5	\$40.7	\$169.2
3	\$147.9	12.6%	\$107.8	\$40.1	27.1%	\$92.3	\$39.0	\$131.3
22	\$144.5	8.1%	\$35.7	\$108.8	75.3%	\$32.3	\$101.4	\$133.7
8	\$136.4	--	\$102.4	\$34.0	24.9%	\$103.8	\$33.3	\$137.1
	\$26,248.9	5.9%	\$8,638.6	\$17,610.3	67.1%	\$8,021.3	\$16,754.5	\$24,775.8

TIME TO FLEX

Graeme Lawrence, chief client officer, Join the Dots



Twelve months ago in this very same report, I commented on our continued growth at Join the Dots, attributing our success to following a plan. As part of the five year planning cycle I mentioned, we uncovered three core challenges faced by clients which we feel will impact the future growth of the industry. These challenges are driven by change.

join the dots

SPONSOR

ACCEPT CHANGE

It's a cliché to say we live in a time of rapid change, but this will probably be the slowest rate of change we will experience in the rest of our working lives. The question is, what sort of change is affecting people, and therefore our industry in attempting to understand them?

In a nutshell, the research industry is under pressure due to economic change (the pressure to deliver fast, high quality insights with increasingly tight budgets); social change (the pressure to take advantage of all the insights that are already out there across social media platforms); and technologically driven change (the pressure to get more out of the mass of data that's now available inside client organisations).

EMBRACE OPPORTUNITIES

But every challenge presents an opportunity and that's exactly what we've embraced at Join the Dots. Our response to our clients' challenges caused by change, has been to develop an insight ecosystem with three cornerstones, from which we've learned how to understand people; these are ask, listen and observe. Under these we can flex our methodology, combine approaches and add context, to join the dots and help clients make better business decisions.

A key intention with the insight ecosystem is to pre-empt the transformation of online communities as we know them. As industry leaders who have worked with communities for over 10 years, we've witnessed this methodology's evolution first-hand. But businesses today face new challenges, consumers have new distractions, and research has new barriers. Now more than ever, online communities must offer both agile and immersive methodologies to deliver faster, more in-depth insights. Our insight ecosystem enables us to do just that.

BE FLEXIBLE

We consider flexibility the key to future success (dare I say, survival?) in our industry – for agencies and clients alike. Only through combining techniques around asking, listening and observing human behaviour, will we unpick the age old problem presented to us: identifying the differences between what people claim they do and what they actually do.

Along with many other agencies, we've had a relatively challenging 12 months at Join the Dots. So in this time of slowing growth and increasing pressure in our industry, I'd encourage researchers on both sides of the fence to accept the changing world we live in, embrace opportunities that may present themselves, and be more flexible in the solutions offered.

“ONLINE COMMUNITIES MUST OFFER BOTH AGILE AND IMMERSIVE METHODOLOGIES TO DELIVER FASTER, MORE IN-DEPTH INSIGHTS.”

PERSPECTIVE FROM THE FASTEST GROWERS

Jane Bainbridge, editor, Research Live



With economic uncertainty and macro political factors affecting our commercial world, it's particularly interesting to hear from those performing well in such a climate, to find out how they are achieving their growth.

Casting an eye over this year's fastest growers shows both big and small agencies can see a significant hike in their revenue – that it's not just the small, nimble agencies that can see double-digit revenue increases.

But what's worth noting is that since the ranking was compiled, some of those achieving this level of success have already caught the eye of agencies on the look out for acquisitions.

For instance, Sparkler – which also won the 2017 Research Live Award for best agency with turnover under £20m – was bought by innovation and transformation consultancy PA Consulting in May 2018. B2B International joined Dentsu Aegis Network's creative B2B agency, gyro, in October 2018 and going back another year, Pulsar merged with qual research agency Face in January 2017.

Growth can come in two forms – organic and by acquisition. While the previous examples show that acquisitions are certainly on many people's radars, for the agencies I spoke to for this feature, organic growth was the preferred method.

Quentin Ashby, CEO of Join the Dots, says: "We've concentrated on organic growth to date. Five consecutive years of 20% plus growth suggests this strategy has served us well but we're not averse to acquisition if the right opportunity presents itself."

Thijs Elias, global business director at MetrixLab adds: "We believe the two [organic and acquisition] go hand-in-hand, with one complementing the other."

And, of course, organic growth can be achieved with different business strategies – building additional work with existing clients or going after new ones. Unsurprisingly, those making this table of top growers are doing both.

"We have seen very high growth rates with clients who are in what we call 'phase two', meaning they've experienced our way of working and its impact in one region or one key domain, and then we accelerate together globally and/or across more topics. Winning new clients has always been a priority for us," says Elias.

Firefish similarly aims to build on its existing strong business relationships to sell additional offers such as kids and family, tracking, innovation and then seek new clients in sectors that are "hungry for human insight" as its group CEO, Jem Fawcus describes them. In recent years, Firefish has extended into innovation, tracking and strategic consultancy.

Ashby says growing existing clients' work has been a big factor in Join the Dots' growth and that being flexible has been paramount.

"WE'VE CONCENTRATED ON ORGANIC GROWTH TO DATE. FIVE CONSECUTIVE YEARS OF 20% PLUS GROWTH SUGGESTS THIS STRATEGY HAS SERVED US WELL."

PERSPECTIVE FROM THE FASTEST GROWERS

“We’ve been able to offer flexible solutions – both agile and immersive methodologies – to help clients support their own stakeholders and tackle the challenges faced in today’s economy. Our online community model lends itself to developing long-standing relationships.”

To this end, Join the Dots has developed its immersive techniques through its qualitative brand, Spirit, and its culture and trends team. “We’ve also expanded our expertise to offer social intelligence to answer briefs that require agility.”

Mark Jeffery, founding director of healthcare specialist The Research Partnership, points to his business’ dual approach, winning new accounts and increasing average project size. “Our directors and business development team have also been working hard to secure new clients. We are now working with all of the top 10 pharmaceutical companies in the world.”

And being a healthcare specialist hasn’t stopped The Research Partnership from entering new spaces. “We’ve expanded more into the medical technology area. There is natural overlap with our current pharma-based business and it is also a sector that’s anticipated to grow 5% per year in the next four to five years.

“IN OUR GRADUATE PROGRAMME THIS YEAR WE TOOK ON 17 RESEARCH ANALYSTS ACROSS OUR THREE MAJOR SITES IN THE US, UK AND SINGAPORE.”

“Over the past four years we have been building our market access capabilities. This now forms a significant part of our business and we run large numbers of combined market access/market research studies,” adds Jeffery.

Physical expansion has also been important, with the company opening three new offices – two in the US and one in France. “Our San Francisco office gives us access to West Coast based pharma companies; our office in New York helps support the significant healthcare business which is based on the East Coast and is also an attractive option to potential employees,” explains Jeffery.

BUILDING THE WORKFORCE

Gaining new clients and extending offices requires additional resources. Join the Dots runs a graduate recruitment programme which helps bring in fresh talent and also recruited heavily in 2017 – at both mid-level and senior – to support its projected growth.

“A number of key hires have contributed to growing our immersive and agile offer – namely developing a team of social intelligence experts, recruiting a commercial semiotician and expanding our in-house creative team. In addition, we’ve bolstered our team of senior client directors,” explains Ashby.

The Research Partnership has grown its workforce by 15% and is still looking to recruit more, as well as running its own graduate scheme. “We are constantly on the lookout for new people who can bring fresh ideas and new areas of expertise. In our graduate programme this year we took on 17 research analysts across our three major sites in the US, UK and Singapore. However, we’re also committed to building the careers of our current employees and have promoted 33 staff this year,” says Jeffery.

“CLIENTS ARE UNDER A LOT OF PRESSURE. THE BACKDROP OF BREXIT MEANS PEOPLE AND BUSINESSES ARE MORE CAUTIOUS ABOUT SPENDING MONEY DUE TO THE UNCERTAINTY WE FACE.”

In terms of new expertise in the business, he’s brought in two analytics directors – one in the UK, one in New York – to strengthen its quantitative side and statistical modelling, segmentation and conjoint methods.

Firefish’s Fawcus says he “runs lean” using a network of associates to step up during busy periods, although he has invested in project management teams “to free up the valuable thinking time of our strategic execs”.

BUSINESS CONDITIONS

Even those performing well are feeling the pressures of current business conditions, with many describing them as “tough”.

Jon Arthurs, MetrixLab’s UK managing director, says: “It’s been a tumultuous year for the research and marketing industries in 2018 with change in technology, client needs and marketing strategies. The old status quo continues to be questioned and those agencies who are agile, innovative and efficient are the ones who are gaining share.”

And it’s never long before the uncertainty around Brexit is mentioned. Ashby says: “Clients are under a lot of pressure. The backdrop of Brexit means people and businesses are more cautious

about spending money due to the uncertainty we face. As researchers we’re having to learn to collaborate with clients more closely than ever to help them in this challenging environment.

“There has definitely been a tightening of purse strings and a slowing down of decision making in the final few months leading up to Brexit. Clients are struggling with the uncertainty of consumers, and the knock-on effect is more cautious budgeting,” he adds. “We’re seeing clients’ budgets squeezed across the board rather than one area. More than ever, the speed-quality-cost trilemma has come to the fore, but we’re working closely with clients to advise how best to spend insight budgets for maximum ROI.”

For Fawcus, Brexit is raising very specific business problems. “My European staff are leaving the UK and I’m having to set up complicated payroll structures to keep them employed from their home countries.”

However, Jeffery isn’t seeing any Brexit effects yet and says business conditions have mostly remained good. “A few companies have had hire freezes or had rumours of being sold off which has created uncertainty in spite of a ‘business as usual’ mantra; fortunately, we have breadth and depth with the clients we work with which protects us from the highs and lows.

“GDPR has been a big concern for pharma and has impacted on how clients look at research and how to talk with customers. It created a lot of uncertainty in the early days of implementation. It hasn’t stopped research going ahead though and the situation has calmed down somewhat.”

LOOKING FORWARD

Maintaining growth isn’t easy – or necessarily desired, depending on the strategy of the business – but clear plans are a must. And inevitably it’s not long before the favourite ‘a’ words are mentioned.

“Growth in our industry will come from automation, AI, new technique development, efficiency and agility. Automation not only brings efficiencies, it also offers increased precision, but we need to ensure it is complemented by adding value to the insight generated,” says Arthurs.

For Ashby, it’s all about being flexible. “Flexibility to blend asking, listening and observation techniques to answer business challenges. We think clients will benefit from fusing these methods, whether that be an online community with social intelligence, or self-ethno with cultural context.”

And when asked where the insight industry will flourish in 2019, he adds: “There is a huge potential for those who can access and analyse the enormous amount of organic data available across the web. Clients are getting to grips with this faster than agencies, but there are opportunities for those who can process this data stream, help clients make sense of it and even use it to predict future behaviour.

“Both quantitative and qualitative skills will be required so researchers in all disciplines can flourish if they embrace this new world and adapt.”

Fawcus, however, thinks future growth will come from a “stronger focus and value on strategic interpretation, rather than just data gathering”. For 2019, he adds: “Forget digital. Forget AI. Forget blockchain. All of that is important, but not as important as the person who will buy your product or use your service. This is a golden age for making sense of the human experience, so expect agencies that can deliver human strategy to thrive.”

“BOTH QUANTITATIVE AND QUALITATIVE SKILLS WILL BE REQUIRED SO RESEARCHERS IN ALL DISCIPLINES CAN FLOURISH IF THEY EMBRACE THIS NEW WORLD AND ADAPT.”

THE CLIENT PERSPECTIVE

Jane Bainbridge, editor, Research Live

Most of the wider macroeconomic factors affecting research agencies are similarly impacting client organisations. Depending on who you speak to, Brexit is either the great unknown, creating an uncertain environment that makes conditions hugely challenging; or it's just more of the same – there is always uncertainty, and this is no worse than usual.

The clients I spoke to remained relatively sanguine about conditions and how things would develop in the coming year. Jessica Salmon, head of customer value and growth, marketing at Telefónica thinks business conditions will remain tough but isn't daunted. "We're heading into unknown waters but that's what makes it exciting. Being put under pressure can force long-needed change and necessity is the mother of invention."

Rhea Fox, head of insight and strategy at Aviva, says the "prospect of significant domestic political change" will affect all businesses, especially retail.

We've also had the General Data Protection Regulation (GDPR) to contend with over the past year although Mike Taylor, group head of insight at Vodafone, says that now seems to have settled, thanks to agency partners. "It is probably testament to agencies doing all the scrambling and compliance for us behind the scenes in a lot of instances. It has made conducting research on your own customers a more rigorous process, but I think that's a good thing."

So, what has worked well for clients in terms of research and insight over the past year? Covering a broad range of sectors, it's perhaps not surprising that the interviewees' answers are wide-ranging.

Taylor says partnerships with the large agencies have been excellent. "The big agency groups have truly started to work from a position of 'best solution to the problem', with no internal barriers/politics around that – it leads to a better overall partnership."

And he has also been trying out some new ideas from small, more digitally-disruptive agency start-ups. "Some work, some don't, but there's definitely a sense of innovation in the industry, which is great."

For drinks business Innocent, Ditte Meynert, its acting head of global insight, says launching an online community has helped give the company "deeper, faster and more cost-effective insights". "It's led to faster and better decision making, and also made insight more accessible to the whole organisation," she adds.

Jake Steadman, Twitter's senior director, insight and analytics (international) says research has been at the heart of the social media giant's global B2B positioning, ensuring its role in revenue growth.

"We've also invested in building new skills and functions, including scaling our neuroscience capabilities and launching a dedicated Audience Insight team led by Matthew Taylor, charged with helping advertisers understand our users more," adds Steadman.

And at the Football Association, its head of research and insight, Ross Antrobus, explains that the organisation has "rehoused and restructured our internal 'big data' sets" to gain a single customer view, getting a new stream of analytics to inform decisions. He added that it has also "highlighted further areas for primary research that the data can't immediately answer".

SPOTLIGHT ON SERVICES

Looking forward, what do clients want in terms of skills and research methods?

"The team is evolving towards a behavioural and business analytics function, with skills coming in from data science so we deliver an internal ROI on the data we've invested in. Converging business data, participant behaviour and data analytics will be the bedrock of our work in the next 18 months," explains Antrobus.

"I DON'T WANT RESEARCH TO BE A PERPETUAL BLOCKER ON SCRUMS, I WANT IT TO BE PART OF AS MANY AGILE PROCESSES AS POSSIBLE."

Data is also on Salmon's agenda. "Machine learning across unstructured data is really starting to interest me. Traditional research usually starts from a hypothesis basis and tests whether it's true or not but doesn't really tell us anything new or that we haven't already imagined. The real excitement is in finding the 'unknown unknowns' and allowing them to fuel innovation."

For Twitter's Steadman it is a case of more of the same, as it builds its audience insight team and invests in automation of its research tools. In terms of what that means for the type of agency services he'll be buying, he says it'll be a mix.

"Using traditional market research methodologies isn't going away – in fact, we'll likely invest more in both qualitative and quantitative work. However, we'll also be looking to work with a broader set of agencies outside the normal definition of market research – I expect marketeers and data scientists will all get more business from us next year."

Taylor concurs, saying he'll employ a mix of large, small and start-ups and says Vodafone will also be putting more focus on "understanding the elements of digital – the purchase, service and communications".

But he's also keen to increase his use of agile methodologies. "I don't want research to be a perpetual blocker on scrums, I want it to be part of as many agile processes as possible. This can lead to more mini projects – self serve and 48-hour turnaround on small but critical issues," he explains.

“PRESENT YOUR DATA IN TERMS OF ROI AND VOLUME/VALUE EXPECTATIONS. I’M ALSO ALWAYS IMPRESSED WITH CLEAN, CLEAR BRANDING AND GOOD DESIGN.”

Meynert says the services Innocent will be buying will reflect the polarisation of the insight industry. “On one end of the spectrum you have top notch brand consultancies providing insight-led strategic guidance to businesses. On the other end you have research agencies who offer very cost-efficient standardised methods to a very high standard. Any agency in between these spectrums will have to work harder to get attention,” she says.

There are further blunt words for agencies about what is required and whether they can achieve it. Andrew Tenzer, head of group insight at Reach (formerly Trinity Mirror) has been doing more research in-house, bypassing agencies entirely. While this is a consequence of tighter budgets, Tenzer says it has meant the company has greater control of the process.

“I’M TIRED OF AGENCIES OFFERING STANDARDISED APPROACHES WHICH ARE DOGMATIC IN THEIR VERY NATURE.”

The company has limited budgets in terms of buying services going forward, but he expands: “I’m only interested in those who show a genuine interest in my business and how they can potentially help me achieve my objectives. I’m tired of agencies offering standardised approaches which are dogmatic in their very nature. All too often agencies get in touch telling me all the ways they can help me without knowing what my challenges are. And stop saying you work for my competitors thinking I’ll be impressed by it – that makes me less likely to work with you!”

So, what can agencies do in the coming year to get noticed by research buyers? Aviva’s Fox says it’s all about commerciality. “Present your data in terms of ROI and volume/value expectations. I’m also always impressed with clean, clear branding and good design.”

The final word goes to Steadman, who says agencies need to think differently across the pitch process and when delivering projects. “I’ve been banging on about this for a while, but I’d love to see agencies devote more thought and attention to how they’re going to package and deliver insight. Researchers seem to justify their value through the length of presentation they give or the amount of phone calls they schedule – it’s unnecessary and boring.”

HIGHLIGHTS FROM THE MRS INDUSTRY SURVEY 2018

David Cahn, principal of synygis consulting



The MRS estimates that the UK research supply industry jumped the £5bn hurdle in 2017, growing by 3% to c.£5.045bn.¹

Our industry is still the second-largest in the world, topped only by the US; and continues to dominate in terms of research spend per head of population: £76.74 per capita in 2017, with the US trailing at £48.42, and France and Germany at £28.39 and £26.09 respectively.

There are c.3,100 active registered businesses in the UK listing market research as their primary activity, and a further 1,700 listing market research as a subsidiary activity.²

¹The ESOMAR annual Global Market Research report notes that the UK 'let go' of a percentage point in growth: but that is a consequence of the UKP / USD exchange rate, which declined year on year by 5.4%, from £1=\$1.35, to \$1.28.

²Source: Companies House, November 2018.

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

Some salient points from the most recent survey, published in June 2018, follow.

BUSINESS EXPECTATIONS

As in 2016, companies in the UK were less upbeat about the prospects for their own company in the year ahead than elsewhere in Europe (as measured by EFAMRO's MoodIndicator). Likewise, UK sentiment regarding the industry as a whole indicated greater pessimism than in Europe – only one fifth in the UK expected the industry to grow over the coming year, compared with 42% in Europe.

ONLINE DATA COLLECTION

Online data collection accounted for 58% of quantitative research spend in 2017, growing from just 40% of spend over five years. Online qualitative work also continued to build, accounting for 23% of qualitative spend in 2017. The traditional methodologies have all suffered: face-to-face fieldwork shrank from 17% to 12% of quantitative spend over five years, telephone fieldwork declined from 14% to 8% of quantitative spend over the same period, and postal from 7% to just 2%.

Well over half of online surveys are now optimised for completion by most devices, whether desktop, laptop, tablet or mobile.

CLIENT SECTORS

The division of spend between client sectors has been notably stable over the past few years, the main sectors being:

Consumer: (FMCG including food and beverages, plus other consumer goods and services)	c. 30%
Government/public sector/not for profit:	c. 15%
IT/consumer tech:	c. 10%
Media:	c. 10%

Allowing for definitional differences, this puts the UK spend higher than the ESOMAR GMR average for consumer (24%), public sector (8%) and IT (6%), but much lower than the rest of the world for media and pharmaceuticals (both 16%).

PRO BONO WORK

About one in six organisations offered pro bono research, representing about 0.06% (c.£3million) additional turnover were it to be invoiced. By ESOMAR standards this is on the low side: 18 other countries provided pro bono information and their average pro bono work was 0.19% of turnover – more than three times the UK proportion.

INTERNATIONAL PROJECT MANAGEMENT

Projects with data collection in one or more overseas countries but controlled and invoiced from the UK have long been a particular strength of UK suppliers, and represented 36% of UK research revenues in 2016. (The corresponding ESOMAR GMR proportion was 26%).

MRS ANNUAL SURVEY 2018

Invitations to take part in this year's Annual Survey will be sent out in February 2019. Please make every effort to respond in full so that we can provide an accurate reflection of the sector.

THE GENDER PAY GAP IN THE MARKET RESEARCH SECTOR

David Cahn, principal of synygis consulting

The gender pay gap is the difference between average male and average female pay in an organisation.¹ The gender pay gap is not the same as unequal pay, which is paying men and women differently for performing the same (or similar) work. Unequal pay has been unlawful since 1970.

The likely contributory causes of the gender pay gap have been widely discussed, and are certainly complex. Societal pressures and assumptions about caring responsibilities are seen as a big factor. The widespread assumption is that women are more likely to care for young children or elderly relatives, which in turn propels them towards part-time work roles, which are often lower paid or have fewer promotion prospects. Employers can exercise discrimination, both conscious and unconscious, against women if they feel that family commitments mean that women are less likely to fully commit to their job. And men tend to take up the majority of senior, highest paid roles in many companies.

“THE GENDER PAY GAP FOR OUR SECTOR IS AS WIDE AS THE GAP ACROSS ALL UK JOBS.”

In October 2018 the UK’s Office for National Statistics (ONS) issued updated gender pay gap data based on the 2017 Annual Survey of Hours and Earnings (ASHE).² Male average hourly earnings across all UK jobs were +18.4% more than the average for females, while the provisional outcome for 2018 was +17.9%.

For market research and opinion polling (SIC 7320) the corresponding figure for 2017 was +17.7%.³

So the gender pay gap for our sector is as wide as the gap across all UK jobs. That might surprise many research people who probably view our industry as one which encourages females to compete on equal terms with males, and where the standard perception is probably that gender bias is less likely to affect promotions and seniority.

The ASHE split by full-time⁴ vs. part-time jobs renders the research sector’s position even more challenging.

THE GENDER PAY GAP IN THE MARKET RESEARCH SECTOR

For full-time jobs, males had a national average pay gap advantage of +9.1%, while the corresponding percentage for the research sector was +16.2%. Analogous industries such as management consultancy (+18.3%) had a similarly large gender pay gap for full-time jobs, though advertising performed much better (+6.1%). A gap of this magnitude for research warrants being more adequately addressed by the research community and ameliorated wherever possible.

Commencing 2018, the mandatory publication of 'larger' companies' (>250 employees) individual gender pay gap calculations has provoked much greater public awareness and discussion of the topic. April 2018 was the deadline for submitting a gender pay gap return⁵ covering the tax year 2016-2017, and information for 10,513 larger organisations was published online⁶, of which MRS identified 32 organisations which feature in the MRS League Tables, or are MRS Company Partners. The combined turnover of these 32 research organisations is c.£2bn – about 40% of the total research sector turnover of c.£5bn. 25 of the 32 also published additional explanatory text on their own websites.

“FOR FULL-TIME JOBS, MALES HAD A NATIONAL AVERAGE PAY GAP ADVANTAGE OF +9.1%, WHILE THE CORRESPONDING PERCENTAGE FOR THE RESEARCH SECTOR WAS +16.2%.”

THE GENDER PAY GAP IN THE MARKET RESEARCH SECTOR

INDIVIDUAL CALCULATIONS FROM THE 32 RESEARCH COMPANY RETURNS ARE SHOWN BELOW.⁷

	GPG MEDIAN HOURLY PERCENT	GPG MEDIAN BONUS PERCENT	MALES IN RECEIPT OF BONUS	FEMALES IN RECEIPT OF BONUS	FEMALE LOWER QUARTILE	FEMALE LOWER MIDDLE QUARTILE	FEMALE UPPER MIDDLE QUARTILE	FEMALE TOP QUARTILE	FEMALE AVERAGE
ASHE 2016–2017 – total	18.4%	n/a			55%	51%	46%	40%	48%
ASHE 2017 – mr and opinion polling (SIC 7320)	17.7%	n/a							
UNWEIGHTED MEDIAN ACROSS ALL RETURNERS (n=10,513)	9.3%	5.0%	35.4%	34.0%	54%	49%	45%	39%	47%
UNWEIGHTED MEDIAN across MR organisations (n=32)	13.0%	28.3%	50.2%	47.0%	58%	55%	51%	44%	52%
WEIGHTED MEDIAN across MR organisations*	17.6%	31.6%							
National Centre For Social Research (NatCen)	-15.0%	0.0%	0.0%	0.0%	52%	56%	76%	75%	64%
Kantar Media UK	-12.7%	38.0%	28.6%	40.5%	28%	24%	30%	33%	29%
FIL Market Research	-12.6%	0.0%	3.6%	3.1%	71%	74%	82%	74%	75%
Ipsos MORI	-0.9%	50.3%	18.8%	17.2%	40%	63%	62%	44%	52%
IFF Research	0.0%	0.0%	47.9%	52.1%	59%	60%	57%	49%	56%
The New Fieldwork Company	0.0%	0.0%	0.0%	0.0%	75%	75%	75%	75%	75%
The Oxford Market Research Agency (TOMRA)	0.0%	0.0%	6.2%	0.0%	75%	82%	92%	88%	84%
Product Perceptions	0.0%	62.5%	71.4%	4.7%	90%	87%	90%	87%	89%
Sensory Dimensions	0.0%	40.4%	8.0%	15.0%	59%	81%	81%	91%	78%
Perspective Research Services	0.3%	0.0%	18.0%	18.6%	52%	50%	64%	55%	55%
Precise Media Monitoring (now Kantar Media)	2.1%	-347.0%	57.4%	52.7%	45%	29%	30%	38%	36%
IMS Health	5.3%	21.3%	86.4%	92.0%	51%	51%	46%	35%	46%
AC Nielsen	6.2%	33.4%	65.0%	64.0%	53%	53%	50%	42%	50%
Millward Brown	8.1%	15.5%	14.0%	12.1%	59%	70%	56%	52%	59%
Informa Plc (Business Intelligence division)	11.8%	16.7%	84.7%	87.6%	46%	36%	34%	23%	35%
Mintel Group	12.4%	18.5%	74.8%	68.9%	56%	58%	46%	38%	50%
Maritz CX	13.5%	41.6%	7.7%	12.6%	46%	63%	38%	49%	49%
GlobalData UK	14.8%	56.7%	51.7%	37.7%	46%	38%	37%	21%	35%
Kantar UK Limited (Ex TNS)	16.9%	47.9%	50.8%	48.0%	60%	56%	50%	39%	51%
Dunnhumby	19.9%	25.2%	78.2%	75.0%	62%	48%	33%	25%	42%
Walnut Unlimited	20.0%	4.5%	13.0%	4.0%	84%	100%	86%	74%	86%
Euromonitor	21.6%	27.0%	57.0%	38.0%	64%	57%	45%	41%	52%
GfK UK	22.0%	47.7%	81.0%	88.4%	60%	53%	45%	29%	47%
IHS Global	23.2%	31.2%	95.0%	94.0%	56%	42%	27%	28%	38%
Experian	24.6%	46.2%	80.8%	80.5%	49%	39%	31%	23%	36%
Wood Mackenzie	25.8%	42.4%	90.5%	90.0%	49%	44%	35%	19%	37%
Teradata UK	28.1%	53.8%	94.9%	90.2%	36%	17%	13%	10%	19%
Yougov	28.7%	27.5%	59.0%	56.0%	59%	49%	38%	22%	42%
Grass Roots Measurement	29.3%	21.6%	45.0%	44.9%	66%	64%	57%	38%	56%
Gartner (incl. CEB Global)	31.8%	62.4%	96.0%	88.0%	58%	49%	43%	20%	43%
Ebiquity	34.0%	29.0%	50.0%	52.0%	65%	53%	56%	31%	51%
Information Resources	39.1%	69.5%	69.6%	64.8%	71%	54%	47%	38%	52%

* Turnover-weighted (using this as an approximation to relative staff numbers)

THE GENDER PAY GAP IN THE MARKET RESEARCH SECTOR

The wide range⁸ of reported hourly pay gaps is noteworthy, ranging from -15.0% in favour of females (NatCen), to +39.1% in favour of males (Information Resources). The range for bonus pay gaps is almost all in favour of males, from +4.5% (Walnut Unlimited) to +69.5% (Information Resources); Precise Media Monitoring is the single outlier (-347%).

The average median⁹ hourly pay rate indicates a gender pay gap somewhat wider than that for all 10,513 returners (+13.0% vs. +9.3%). The gap for bonuses is much wider; +28.3% for the 32 research companies vs. +5.0% for the total 10,513.

In mitigation, bonuses are more widespread among the 32 research organisations, both for females and males, than for the total 10,513. Furthermore, the research organisations have a higher female ratio (52%) than either the total 10,513 (47%) or indeed the ASHE 2017 average (48%). The pro-female bias among research companies is evident both in total and across all pay quartiles.

Some gender pay gap percentages may have been calculated incorrectly;¹⁰ as organisations become familiar with the process and systematise the gathering of the data, such errors should reduce. Judging by research organisations' published statements, it is evident that the research community as a whole does recognise that the gender pay gap exists, that it is unacceptably wide and that it should be narrowed. In particular:

- Most companies (though not all) do appreciate that the gender pay gap is just part of the larger discourse around diversity and inclusion in which employers need to actively engage.
- In most cases, the gender pay gap was seen as the consequence of having too few senior women, and in particular insufficient female representation in the top quartile of employees.

But there were also organisations which positioned gender pay gap as a positive indicator on the grounds that female employees were being given the opportunity to make individual career-lifestyle choices.

ACTION PLANS

Most organisations, though not all, expressed dissatisfaction with their current gender pay gap and presented an Action Plan to reduce their gap.

Ipsos MORI, whose median gender pay gap is already the narrowest of the 32 research organisations, (-0.9%), offer a benchmark example:

"We have established an Inclusion Group, who will work alongside the UK Management Board and senior leadership team, to formulate and deliver our strategy and implementation plan.

We will be rolling out unconscious bias training to hiring and promoting managers to ensure we are not unknowingly replicating current structures.

We will ensure we have eliminated any potential bias from our recruitment process, by selecting gender-balanced shortlists of candidates; reviewing CVs with personal information removed; not asking for details of current/last reward package; and ensuring flexible working is both promoted and favourably considered at recruitment stage.

We will ensure a better gender split in all our training and professional training courses, in particular those designed for managers, senior leaders and our leaders of the future. We will also be examining our gender balance with regards to instructors and trainers.

We will develop a programme of female-focused events, networking opportunities, and cross-company mentoring.

*We will be encouraging more people to take advantage of our flexible working and family friendly policies, including part-time, jobsharing and remote working."*¹¹

THE GENDER PAY GAP IN THE MARKET RESEARCH SECTOR

Other Action Plans including those from Informa, Kantar, Nielsen and Wood Mackenzie, also referred to a high-level ‘team’ or ‘structure’ usually with a direct board report, either extant or to be set up. Typically, the team is tasked with maximising diversity/inclusivity in general and the maximisation of women’s potential, including minimising the gender pay gap, in particular.

The commitment to unconscious bias training is also declared by Dunnhumby, GfK, IHS, Informa and Nielsen in their armoury of planned or implemented actions.

Recognition of the key action areas of recruitment, training, appraisal and salary-setting, and promotion was a theme common to many plans.

- Many companies are at pains to point out (correctly) that the gender pay gap and unequal pay are two separate issues.

GOOD PRACTICE

The return from the National Centre for Social Research (NatCen) stands out. It has one of the highest levels of female employment (65%) among the ‘full-service’ research organisations, i.e. those employing both interviewers and office staff. Its median gender pay gap (-15.0%) is the most positive for females of the 32 research organisations.

NatCen has usefully supplemented its return with an analysis of the median gender pay gaps *within* pay quartiles. They are: 0% for the lower and lower middle quartiles, all of whom are interviewers; -4.0% for the upper middle quartile, which is dominated by highly specialised and highly remunerated female nurse interviewers; and +32% for the upper quartile, where there are a higher proportion of men in senior positions.

Other research organisations have also highlighted the impact on gender pay gaps of a forced ‘apples and pears’ comparison between jobs with inherently different requirements and responsibilities (such as interviewers and office-based researchers)¹². These organisations can point out that interviewers and data entry staff are predominantly female and on lower pay, so that a gender pay gap would tend to result automatically when combining these jobs with higher-paid research personnel jobs.

Several research companies, including Ebiquity, The Oxford Market Research Agency and Walnut Unlimited, have broken out their analysis accordingly, separating ‘office’ and ‘field’ staff (though the official reporting does constrain them into just one set of overall figures).

This more detailed type of analysis and discussion is one that other research organisations could consider when next reporting their gender pay gap.

NEXT STEPS

The larger research organisations’ gender pay gap results for 2017-2018 are due on the government website by April 2019. MRS will analyse and report on these results, looking in particular on the progress in narrowing the gap year-on-year. MRS will also be looking at other related issues, such as the recent discussions about ‘pay ratios’ i.e. the gap between the pay of the chief executive and an ‘average’ worker.

THE GENDER PAY GAP IN THE MARKET RESEARCH SECTOR: NOTES

- 1 The gender pay gap is calculated as the difference between average earnings (excluding overtime) of men and women as a proportion of average earnings (excluding overtime) of men. The two most commonly discussed gaps are for average hourly earnings and for bonus pay.

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

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

There are at least two ways to calculate average earnings – the mean average and the median average (the mid-point when individual earnings are ranked by value). The median is ONS' preferred measure for average earnings as it is less affected by the potentially disproportionate impact of very high earners.
- 2 ASHE, the reference source for the gender pay gap across all UK employers, irrespective of size, is based on a 1% random sample of the c.26million employee jobs registered to PAYE schemes. For 2017, 320 jobs classified as market research and opinion polling (SIC 7320) were sampled, 240 full-time and 80 part-time.

Over the last five years, the gender pay gap median for full-time market research jobs has remained steady at just under +20% in favour of males. The median gender pay gap for part-time jobs has favoured females, though with more year-to-year variation, as a consequence of the smaller sample size analysed by ASHE.
- 3 Provisional ASHE data for 2018 were also published in October 2018. While the total for full-time jobs in SIC 7320 is +18.7%, in line with previous years, the outcome for all jobs, (+32.6%) is so out of kilter with previous years, that these data should be treated with caution pending possible revision.
- 4 Full-time employees are those working more than 30 paid hours per week (25 or more for teachers).
- 5 The information required was: mean and median gender pay gap in hourly pay and bonus, the proportion of females and males receiving a bonus, and the proportion of females / males in each pay quartile.
- 6 <https://gender-pay-gap.service.gov.uk/Viewing/search-results>
- 7 To align with the ASHE recommendation, MRS has focussed on median hourly pay. Also, the mandatory return did not ask for a full-time / part-time split, so the analysis is for all jobs.
- 8 Though not as wide a range as all 10,513 returners, whose hourly pay gaps range from -197%, to +320%, and bonus pay gaps from -120695% to +3848% (sic).
- 9 The average median for returners is indicative only, because it should probably be weighted by payroll size to reflect the relative influence of larger/smaller companies. Using turnover as a surrogate for payroll size yields a weighted estimate for the research companies close to ASHE 2017 SIC 7320.
- 10 For example, an exact 0.0% median gap is statistically rather unlikely in a larger organisation.
- 11 https://www.ipsos.com/sites/default/files/cp/about_us/documents/2018-03/ipsos-mori-gender-pay-gap-report-2017.pdf
- 12 Of the 10,513 total returns, the budget airlines easyJet and Ryanair reported one of the widest gender pay gaps – median gaps of 45.5% and 71.8% respectively. easyJet pointed out that its gender pay gap is strongly influenced by the salaries and gender make-up of its pilot community, which make up over a quarter of its UK employees. Pilots are predominantly male and their higher salaries, relative to other employees such as cabin staff (predominantly female), significantly increases average male pay.

HELPING BRANDS STAY AHEAD OF THE CURVE



Streetbees is a platform that connects brands with people around the world and provides consumer data in real time. The network currently has one million users – or ‘bees’. The user submits qualitative data through photos, videos and open text, as they are carrying out their activities, for example, having a cup of coffee. Natural language processing (NLP), machine learning algorithms and geo-location technology are then used to derive insights from this unstructured data.

After winning the Best Innovation award at the 2018 MRS Awards, Research Live spoke to Vidisha Gaglani, head of research at Streetbees, to find out more.

ARE YOUR ‘BEES’ OR PARTICIPANTS FREE TO CHOOSE THEIR PREFERRED MEDIUM (VIDEO, PHOTO, TEXT) FOR SHARING THEIR LIVES?

Generally, we set the medium based on what we believe is the most natural and powerful way to capture the data in question. Stories usually consist of a combination of open text responses, photos and short videos. Almost all of our bees share their stories with us via mobile.

HAVE YOU MADE SURPRISE FINDINGS VIA THE STREETBEES PLATFORM THAT WOULDN'T HAVE OCCURRED THROUGH TRADITIONAL RESEARCH METHODS?

Yes! We’ve shown the largest consumer brands why people weren’t using their products in the way they expected, while our AI has discovered an entirely new consumer category – a large number of young people replacing their main meals with snacks so they can keep playing online or on their phones without letting go.

HELPING BRANDS STAY AHEAD OF THE CURVE

HAVE YOU NOTICED ANY REGIONAL/CULTURAL DIFFERENCES WHEN IT COMES TO PEOPLE SHARING INFORMATION ABOUT THEMSELVES?

We receive many detailed and surprisingly personal responses. There are some cultural barriers – such as getting home videos from people in societies where privacy is highly prized. However, people all over the world are becoming more comfortable sharing, as this is something they do as part of their day-to-day lives. Also, they feel their opinion matters and want to share it!

DO YOU FIND PEOPLE ARE MORE OPEN TO SHARING IN THIS WAY TO A DEGREE THAT WOULDN'T HAVE HAPPENED THROUGH 'TRADITIONAL' MEANS?

Absolutely. There's a huge difference between asking someone what they had for breakfast last week in a closed survey, and having them show you in the moment, or through a conversation. Not only do you get greater accuracy – because you aren't relying on claimed behaviour – you're also getting much more context, such as the emotional triggers, as people share more. Essentially, you're getting qualitative data at a quantitative scale.

IS IT EASIER TO RECRUIT PARTICIPANTS FOR THIS TYPE OF RESEARCH?

It isn't always easy, but we have several advantages. First, the mobile app means you immediately have access to a big potential audience. Second, the app is fun to use and people genuinely enjoy sharing their stories with us from across the world, and we've worked hard to build up our communities of bees. In addition, we also compensate people fairly for the time they spend sharing their information with us.

HOW DO YOU SOURCE AND APPROACH PARTICIPANTS IN HARD-TO-REACH AREAS OR GROUPS OF PEOPLE?

We recruit community leaders, whose job it is to develop communities and spread the word about Streetbees in different countries and areas. We've had great success organically building substantial groups of bees across the world.

HOW DOES THE CONVERSATIONAL AI WORK?

We use a chatbot-style app to have a dialogue with the bees, asking questions and inviting them to capture specific moments of their lives of interest to the study using their phones in real time. No-one would consider multiple-choice questions to be conversational. We then use the system we have built using machine learning and natural language processing to process those conversational responses, and the items logged, to make sense of this unstructured data by detecting patterns and themes.

HOW WILL AI DEVELOP WITHIN YOUR SOLUTION AND WHAT WILL IT ACHIEVE THAT IT CURRENTLY CANNOT DO?

Our tech is already smart, but it's still working with patterns in data, rather than understanding the information contained using prior knowledge, as humans would. As we add this capacity, the AI will see further 'second order' patterns in the data, and will start to tell us what the stories behind them are. It will also get increasingly knowledgeable and precise with each study, as it builds on its knowledge. Eventually, it may generate the questions that get asked, personalised to each bee and conversation, and even design the studies.

HELPING BRANDS STAY AHEAD OF THE CURVE

HOW DOES THE TECHNOLOGY MANAGE LANGUAGES?

Surveys can be conducted in any language and our final results, in the form of dashboards, can also be produced in a language of the client's choosing. For the automated analysis we use a combination of human translator and advanced machine translation techniques, allowing us to uniformly analyse data across multiple languages.

WHAT IS GOING TO BE THE NEXT IMPORTANT INNOVATION FOR RESEARCH?

The trend will move firmly away from asking questions – a reactive form of response – to just observing and listening through an 'always on' approach. This will enable us to build up a huge bank of data and help brands understand people and ultimately make better business decisions. We're changing market research into a proactive tool to help companies stay ahead of the curve, rather than one used to try and solve problems they already have.

You can find out more about the finalists and winners of MRS Awards 2018 at mrs.org.uk/awards

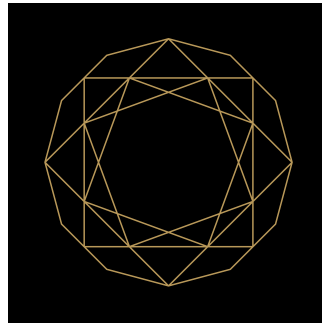
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Connecting the sector

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



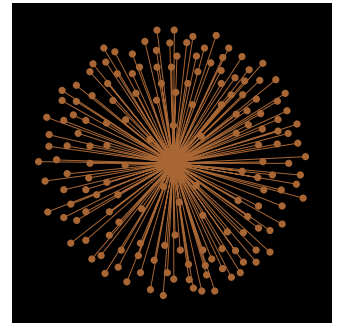
Training and Qualifications



MRS Awards



Research Jobfinder



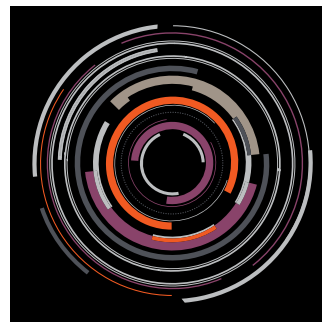
The Research Buyers Guide



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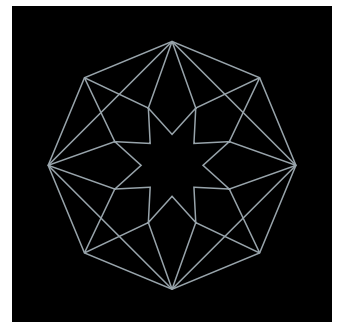
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ABOUT MRS

The Market Research Society (MRS) is the UK professional body for research, insight and analytics. We recognise 5,000 individual members and over 500 accredited company partners in over 50 countries who are committed to delivering outstanding insight. As the regulator, we promote the highest professional standards throughout the sector via the MRS Code of Conduct. MRS supports the sector with specialist training and qualifications, professional membership, company accreditation, cutting-edge conferences, glittering awards and advice on best practice.

Find out more about MRS at www.mrs.org.uk

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