THE RESEARCHLIVE INDUSTRY REPORT 2021

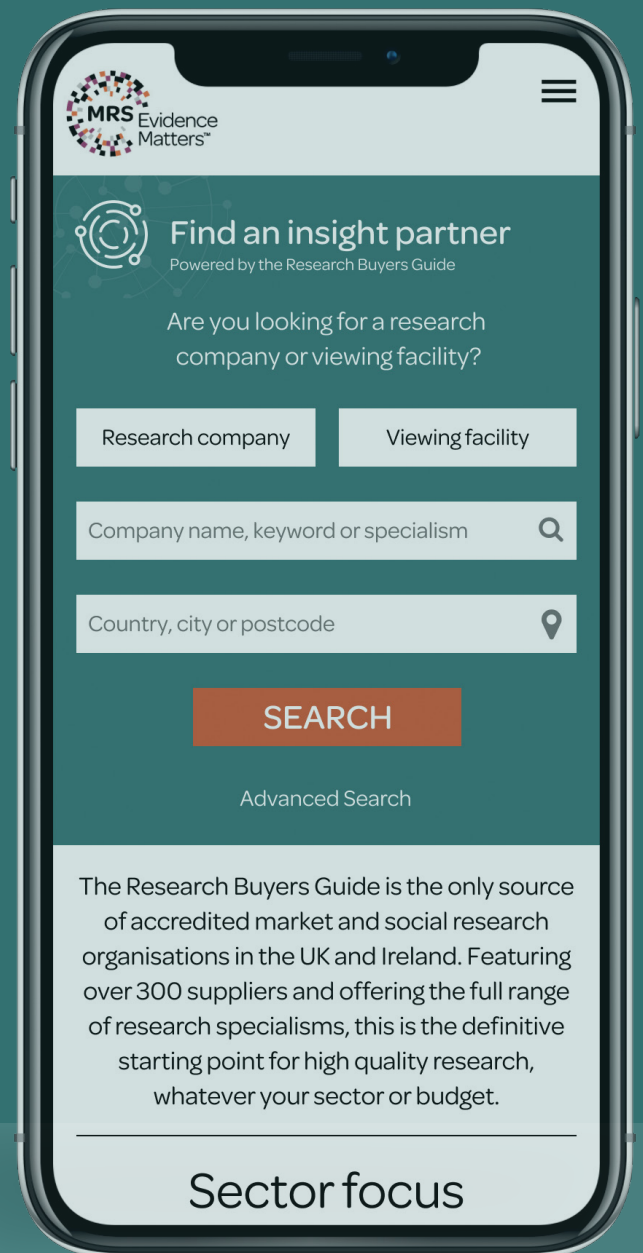## INCLUDING THE NEW MRS LEAGUE TABLES

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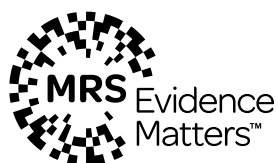
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INTRODUCTION

Jane Frost, chief executive, MRS

Welcome to the Research Live Industry Report 2021

This report brings together multiple sources of intelligence, including an important resizing of the research and data analytics industry which is now valued at £7bn. That's more than a 40% uplift on the previous estimate made in 2016* (page 16).

The MRS League Tables are built on 2019 financial data submitted and collected in 2020; the data is focused solely on UK-based turnover and international work managed and invoiced from the UK.

To complement this historic data our Research Live editorial team has spoken to clients (page 27) and some of the fastest growing agencies (page 23) to ensure the report is forward looking and includes analysis of the latest trends.

This is the year when the research sector – clients and suppliers – has proved its value in a time of crisis. The very specific skills we have developed over decades have been apparent, with fieldwork, data analytics and interviewing expertise a critical factor in understanding the uncertainties of Covid-19.

This report reiterates our contribution to the economy, and this industry is one of the UK's success stories in terms of export revenue (page 5). It's rare that you can say the UK has a genuine world leading industry such as it does in research.

As Sir David Spiegelhalter writes (page 31), the value of statistics has never been greater. We all have a lot to celebrate, particularly those winners of MRS Awards 2020.

As MRS celebrates its 75th anniversary in 2021, it's worth remembering that Harold Wilson was a President of both MRS and the Royal Statistical Society. I look forward to celebrating this significant milestone with you all next year.

There are no doubt difficult times ahead for the industry, but this report should give us all some confidence that we are well placed to last another 75 years.

Jane Frost

Jane Frost, CBE, chief executive, MRS

* Business of Evidence 2016

HIGHLIGHTS FROM THIS REPORT

7bn

+40% ON 2016
THE UK RESEARCH, INSIGHT AND ANALYTICS INDUSTRY IS ESTIMATED TO BE UP 40% VS. THE 2016 ESTIMATE OF £4.8bn*

£3.8bn

TURNOVER OF TOP 100 INDIVIDUAL AGENCIES
£3.756bn VERSUS £3.627bn THE PREVIOUS YEAR

4.8%

GROWTH
YEAR-ON-YEAR FOR TOP 100 INDIVIDUAL AGENCIES

64k

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

4,000+

ENTERPRISES ENGAGED IN 'THE BUSINESS OF EVIDENCE'

49%

OF EUROPEAN RESEARCH OUTPUT IS GENERATED IN THE UK

* Business of Evidence 2016

MRS LEAGUE TABLES
ANALYSIS

David Barr, league tables compiler

In 2019, the Top 100 individual agencies generated a total turnover of £3.756bn. Overall year-on-year growth within these 100 agencies was 4.8%.

A note of caution is essential in relation to the 2019 tables. 2019 was the last full year of pre-COVID-19 trading. However, while trading itself preceded the pandemic, the availability of audited annual reports and statutory filings has been significantly delayed. The 2019 tables therefore contain an unusually high number of compiler's estimates. Every effort has been expended to make those estimates as well-informed as possible, but some inaccuracy is inevitable.

TOTAL TURNOVER AND GROWTH RATES OF TOP 100 INDIVIDUAL AGENCIES

	2015	2016	2017	2018	2019
TOTAL TURNOVER	£2.942bn	£3.026bn	£3.295bn	£3.627bn	£3.756bn
GROWTH RATE	6.7%	2.8%	6.5%	3.9%	4.8%

NUMBER OF TOP 100 INDIVIDUAL AGENCIES WITH GROWING/DECLINING TURNOVER

	2015	2016	2017	2018	2019
GROWING TURNOVER	72	67	64	57	72
DECLINING TURNOVER	28	33	36	43	28

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 threshold for eligibility, and 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 within the table in each particular year. It does not represent growth over the previous year's table, and should not be interpreted as a general growth rate for the whole industry.

INTERNATIONAL CONTEXT
1. ULTIMATE OWNERSHIP
The table of the Top 50 Consolidated Businesses Ranked by Turnover 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 / US: 15 / France: 2 / Belgium: 2 / Others: 5 (one each from Germany, Netherlands, Norway, Japan, Bermuda).

2. UNITED STATES
The world's largest industry is in the United States. Second largest is the UK, disproportionately so when placed in the context of the size of the US economy. However, the US is a major investor in the UK-based industry (see above). In the UK the turnover level for eligibility for entry in the MRS Top 50 Table of Consolidated Businesses is comparable to that in the US for the AMA Gold Top 50. In any mature industry there is an expectation of a high level of consolidation at the top accompanied by a long tail of much smaller businesses. Clearly the UK has a greater number of substantial medium-sized businesses than the US, and also a much more internationally-focused industry. Many of the leading groups in the US (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.

3. EUROPE
The UK is by far the largest supplier in Europe of market research, insight, and analytics, representing over 49% 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 nor 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 a few companies, turnover is estimated. Estimates are in italics and tend to be cautious.

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

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

MRS LEAGUE TABLES
TOP 100 INDIVIDUAL AGENCIES RANKED BY TURNOVER

2019 MRS LEAGUE TABLES, COMPILED NOVEMBER 2020

2019 RANKING NUMBER	CHANGE ON PREVIOUS RANKING	2018 RANKING NUMBER	COMPANY NAME	2019 (£M.)	2018 (£M.)	2017 (£M.)	% CHANGE ON PREVIOUS YEAR	GROWTH RANKING
1	=	1	Kantar	461.500	460.168	458.765	0.289%	72
2	=	2	Gartner	278.880	261.124	200.379	6.800%	36
3	=	3	Dunnhumby	260.551	249.162	253.297	4.571%	45
4	▲	5	Ipsos MORI	244.900	205.974	199.979	18.899%	11
5	▼	4	Wood Mackenzie	226.703	209.631	197.542	8.144%	26
6	=	6	GlobalData	178.195	157.553	118.649	13.102%	17
7	=	7	Euromonitor	140.730	137.395	122.484	2.427%	54
8	=	8	Mintel	128.340	120.053	115.226	6.903%	34
9	=	9	CACI	111.723	110.713	99.448	0.912%	66
10	=	10	AC Nielsen	108.990	109.810	110.582	-0.747%	79
11	▲	12	IQVIA Solutions	78.113	72.480	74.436	7.772%	29
12	▲	14	Forrester Research	76.500	64.204	64.383	19.151%	10
13	=	13	Ebiquity	68.733	69.368	87.376	-0.915%	82
14	▲	16	Dynata Global UK	63.750	58.784	47.123	8.448%	24
15	▲	17	Informa Telecoms & Media	59.750	55.324	58.765	8.000%	28
16	▲	18	Information Resources	56.750	52.518	45.123	8.058%	27
17	▼	11	Gfk	52.084	98.610	105.588	-47.182%	100
18	▼	15	Teradata	48.037	57.789	60.901	-16.875%	98
19	=	19	IDC	47.550	42.306	37.860	12.395%	18
20	▲	23	YouGov	41.200	31.300	27.100	31.629%	6
21	▼	20	WGSN	40.771	37.405	35.479	8.999%	22
22	▼	21	NatCen	34.872	33.357	33.106	4.542%	47
23	▲	24	The Research Partnership	33.248	30.670	27.517	8.406%	25
24	▲	25	Hall & Partners	28.550	28.032	30.234	1.848%	60
25	▲	26	Cello Health Insight	25.745	25.245	24.734	1.981%	57

Those in *italics* are estimated or partially estimated figures

Those marked '--' are new entrants

2019 MRS LEAGUE TABLES, COMPILED NOVEMBER 2020

2019 RANKING NUMBER	CHANGE ON PREVIOUS RANKING	2018 RANKING NUMBER	COMPANY NAME	2019 (£M.)	2018 (£M.)	2017 (£M.)	% CHANGE ON PREVIOUS YEAR	GROWTH RANKING
26	▲	28	Toluna	25.654	25.885	22.805	-0.892%	81
27	=	27	Frost & Sullivan	24.550	23.345	22.106	5.162%	43
28	▲	29	Connexity	21.700	20.612	17.289	5.278%	41
29	▲	31	IHS Markit Economics	20.850	19.943	18.812	4.548%	46
30	▲	32	The Gallup Organisation	19.106	18.746	15.639	1.920%	58
31	▼	30	MaritxCX	18.763	20.089	16.793	-6.601%	93
32	▲	78	Savanta	18.701	11.884	6.233	57.363%	4
33	=	33	WorldOne Research	18.150	18.255	20.563	-0.575%	76
34	▼	22	MMR Research Worldwide	17.808	17.290	18.495	2.996%	51
35	▲	39	C Space	17.707	15.011	13.469	17.960%	13
36	▼	34	Confirmit	17.550	17.755	19.184	-1.155%	85
37	--	--	Nielsen Media Research	17.450	3.607	3.874	383.782%	1
38	▲	43	Black Swan Data	17.050	16.528	15.916	3.158%	49
39	▼	38	Kynetec	16.237	15.142	16.436	7.232%	32
40	▲	42	Populus	15.790	13.555	13.105	16.488%	14
41	▼	35	Walnut Unlimited	15.770	17.737	22.665	-11.090%	95
42	▼	41	Prescient Healthcare	15.150	14.423	13.574	5.041%	44
43	▲	45	JoinTheDots/InSites Consulting	14.956	12.642	12.052	18.304%	12
44	▲	53	Information Services Group	14.100	11.692	8.861	20.595%	9
45	▼	44	BVA BDRC	13.461	13.310	13.148	1.134%	65
46	▲	85	Concentra Analytics	13.412	6.922	11.638	93.759%	3
47	▲	58	Basis Research	13.407	10.547	10.696	27.117%	7
48	--	--	Ipsos Interactive Services	13.300	12.864	13.165	3.389%	48
49	=	49	Firefish	13.081	12.162	11.860	7.556%	31
50	▼	47	PwC Research	12.655	12.555	10.355	0.796%	68

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2019 MRS LEAGUE TABLES, COMPILED NOVEMBER 2020

2019 RANKING NUMBER	CHANGE ON PREVIOUS RANKING	2018 RANKING NUMBER	COMPANY NAME	2019 (£M.)	2018 (£M.)	2017 (£M.)	% CHANGE ON PREVIOUS YEAR	GROWTH RANKING
51	▲	57	Shoppertrak	12.450	12.218	11.166	1.899%	59
52	▼	48	Nielsen Book Services	12.275	12.391	12.568	-0.936%	83
53	▼	46	Defaqto	12.250	12.544	11.653	-2.344%	87
54	▼	51	?What If!	12.105	12.002	11.900	0.858%	67
55	▼	52	B2B International	11.850	11.796	11.009	0.458%	71
56	▼	40	Incite Marketing Planning	11.781	14.770	14.983	-20.237%	99
57	▼	54	The Planning Shop International	11.750	11.659	9.281	0.781%	69
58	▼	55	Flamingo Research	11.675	11.426	20.397	2.179%	56
59	▼	56	Adelphi International Research	11.450	11.301	12.878	1.318%	64
60	=	60	KPMG Nunwood Consulting	10.553	9.935	7.963	6.220%	37
61	▼	50	Watermelon	10.478	12.096	16.978	-13.376%	96
62	▲	70	Strategy Analytics	10.472	10.394	9.951	0.750%	70
63	--	--	Quantexa	10.238	5.018	1.253	104.026%	2
64	▼	62	Harris Interactive	10.098	9.221	8.808	9.511%	21
65	▼	64	Sparkler	9.900	8.979	7.462	10.257%	19
66	▲	82	Behavioural Insights	9.848	7.183	6.239	37.101%	5
67	▲	69	MetrixLab	9.454	8.696	6.581	8.717%	23
68	▼	65	NPD Group	9.450	8.937	8.336	5.740%	38
69	▲	72	IFF Research	9.230	8.160	7.278	13.113%	16
70	▼	63	Quadrangle	9.155	9.017	8.539	1.530%	63
71	▼	66	Consulting at McCann Health	9.050	8.888	7.043	1.823%	61
72	▼	67	Cello Bright Blue	8.820	8.852	8.883	-0.362%	74
73	--	--	GlobalWebIndex	8.754	6.956	5.447	25.848%	8
74	▼	59	MARU/edr	8.750	8.825	10.291	-0.850%	80
75	▼	68	2CV	8.725	8.828	10.636	-1.167%	86

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2019 MRS LEAGUE TABLES, COMPILED NOVEMBER 2020

2019 RANKING NUMBER	CHANGE ON PREVIOUS RANKING	2018 RANKING NUMBER	COMPANY NAME	2019 (£M.)	2018 (£M.)	2017 (£M.)	% CHANGE ON PREVIOUS YEAR	GROWTH RANKING
76	▼	61	Datamonitor	8.090	9.728	10.966	-16.838%	97
77	=	77	Jigsaw Research	8.022	7.625	6.650	5.207%	42
78	▼	71	Nielsen Sports	7.850	8.244	8.781	-4.779%	92
79	▲	81	Tti Global Research	7.770	7.790	8.130	-0.257%	73
80	▼	79	BMG Research	7.768	7.547	7.001	2.928%	52
81	▼	80	Simpson Carpenter	7.749	7.355	6.730	5.357%	40
82	▼	73	Kokoro	7.722	7.995	7.688	-3.415%	90
83	▼	76	Market Force Information	7.575	7.626	10.238	-0.669%	77
84	▼	74	ComScore	7.550	7.763	7.846	-2.744%	89
85	▼	75	Engine Transformation	7.525	7.726	9.965	-2.602%	88
86	▼	84	Edge by Ascential	7.500	7.013	7.813	6.944%	33
87	▼	86	Verve	7.081	6.892	6.923	2.742%	53
88	▼	83	Nielsen Netratings	7.050	7.082	7.121	-0.452%	75
89	▼	87	Northstar Research Partners	6.859	6.656	6.100	3.050%	50
90	▼	89	Trinity McQueen	6.772	6.144	5.115	10.221%	20
91	--	--	Ipsos Retail Performance	6.700	7.238	6.731	-7.433%	94
92	▲	94	The Nursery Research & Planning	6.456	5.643	4.627	14.407%	15
93	▼	92	Promar International	6.301	5.899	5.900	6.815%	35
94	▼	90	System 1 Research	6.272	6.126	8.175	2.383%	55
95	▼	88	Pulsar	6.270	6.172	7.141	1.588%	62
96	▼	93	ESA Retail	6.108	5.678	5.686	7.573%	30
97	▼	91	This Is Motif	5.730	6.001	7.153	-4.516%	91
98	▲	99	Springboard Research	5.650	5.354	5.034	5.529%	39
99	▼	95	Perspective Research Services	5.524	5.586	5.712	-1.110%	84
100	=	100	DJS Research	5.161	5.199	4.653	-0.731%	78
TOTAL				**3756.139**	**3583.650**	**3430.211**		

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MRS LEAGUE TABLES
TOP 20 FASTEST-GROWING INDIVIDUAL AGENCIES

2019 MRS LEAGUE TABLES, COMPILED NOVEMBER 2020

2019 RANKING	GROWTH RATE	COMPANY NAME	2019 (£M.)	2018 (£M.)
1	383.782%	Nielsen Media Research	*17.450*	3.607
2	104.026%	Quantexa	10.238	5.018
3	93.759%	Concentra Analytics	13.412	6.922
4	57.363%	Savanta	18.701	11.884
5	37.101%	Behavioural Insights	9.848	7.183
6	31.629%	YouGov	41.200	31.300
7	27.117%	Basis Research	13.407	10.547
8	25.848%	GlobalWebIndex	8.754	6.956
9	20.595%	Information Services Group	*14.100*	11.692
10	19.151%	Forrester Research	*76.500*	64.204
11	18.899%	Ipsos MORI	*244.900*	205.974
12	18.304%	Join The Dots/ Insites Consulting	14.956	12.642
13	17.960%	C Space	17.707	15.011
14	16.488%	Populus	15.790	13.555
15	14.407%	The Nursery Research & Planning	6.456	5.643
16	13.113%	IFF Research	9.230	8.160
17	13.102%	GlobalData	178.195	157.553
18	12.395%	IDC	*47.550*	42.306
19	10.257%	Sparkler	9.900	8.979
20	10.221%	Trinity McQueen	6.772	6.144

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MRS LEAGUE TABLES
TOP 50 CONSOLIDATED BUSINESSES RANKED BY TURNOVER

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1	=	1	Kantar	461.500	460.168	458.765	0.289%	40
2	=	2	Gartner	278.880	261.124	200.379	6.800%	23
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5	▼	4	Wood Mackenzie	226.703	209.631	197.542	8.144%	17
6	=	6	GlobalData	178.195	157.553	118.649	13.102%	11
7	=	7	Nielsen	153.615	141.134	142.926	8.843%	13
8	=	8	Euromonitor	140.730	137.395	122.484	2.427%	34
9	=	9	Mintel	128.340	120.053	115.226	6.903%	22
10	=	10	CACI	111.723	110.713	99.448	0.912%	38
11	▲	13	IQVIA Solutions	78.113	72.480	74.436	7.772%	19
12	▲	16	Forrester Research	76.500	64.204	64.383	19.151%	6
13	▲	14	Ebiquity	68.733	69.368	87.376	-0.915%	44
14	▲	15	Informa	67.840	65.052	69.731	4.286%	31
15	▲	18	Dynata Global UK	63.750	58.784	47.123	8.448%	15
16	▼	12	Omnicom/DAS	63.425	77.429	86.259	-18.086%	49
17	▲	19	Information Resources	56.750	52.518	45.123	8.058%	18
18	▼	11	GfK	52.084	98.610	105.588	-47.182%	50
19	▲	21	Ascential	48.271	44.418	43.292	8.674%	14
20	▲	17	Teradata	48.037	57.789	60.901	-16.875%	48
21	▲	23	IDC	47.550	42.306	37.860	12.395%	12
22	=	22	Cello Health	43.860	43.799	44.918	0.139%	41
23	▲	26	YouGov	41.200	31.300	27.100	31.629%	3
24	▲	25	ITWP	35.752	35.106	31.613	1.840%	37
25	▼	24	NatCen	34.872	33.357	33.106	4.542%	30

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MRS LEAGUE TABLES
TOP 50 CONSOLIDATED BUSINESSES
RANKED BY TURNOVER (CONT.)

2019 MRS LEAGUE TABLES, COMPILED NOVEMBER 2020

2019 RANKING NUMBER	CHANGE ON PREVIOUS RANKING	2018 RANKING NUMBER	COMPANY NAME	2019 (£M.)	2018 (£M.)	2017 (£M.)	% CHANGE ON PREVIOUS YEAR	GROWTH RANKING
26	▲	27	The Research Partnership	33.248	30.670	27.517	8.406%	16
27	▲	28	BVA-BDRC Group	30.616	28.957	27.815	5.729%	24
28	▲	29	Frost & Sullivan	24.550	23.345	22.106	5.162%	26
29	▲	30	Connexity	21.700	20.612	17.289	5.278%	25
30	▲	32	IHS Markit Economics	20.850	19.943	18.812	4.548%	29
31	▲	37	Populus Group	19.684	17.319	16.790	13.656%	10
32	▲	33	The Gallup Organisation	19.106	18.746	15.639	1.920%	35
33	▼	31	MaritzCX	18.763	20.089	16.793	-6.601%	46
34	--	--	Savanta	18.701	11.884	6.233	57.363%	2
35	▼	34	WorldOne Research	18.150	18.255	20.563	-0.575%	42
36	▼	20	MMR Research Worldwide	17.808	17.290	18.495	2.996%	33
37	--	--	C Space	17.707	15.011	13.669	17.960%	8
38	▼	35	Confirmit	17.550	17.755	19.184	-1.155%	45
39	▲	43	Black Swan Data	17.050	16.528	15.916	3.158%	32
40	--	--	Dentsu Aegis Network	17.003	17.151	16.666	-0.863%	43
41	▼	40	Kynetec	16.237	15.142	16.436	7.232%	21
42	▼	36	Walnut Unlimited	15.770	17.737	22.665	-11.090%	47
43	▼	42	Prescient Healthcare	15.150	14.423	13.574	5.041%	27
44	=	44	JoinTheDots/Insites Consulting	14.956	12.642	12.052	18.304%	7
45	--	--	Information Services Group	14.100	11.692	8.861	20.595%	5
46	--	--	Concentra Analytics	13.412	6.922	11.638	93.759%	1
47	--	--	Basis Research	13.407	10.547	10.696	27.117%	4
48	▼	47	Firefish	13.081	12.162	11.860	7.556%	20
49	▼	46	PwC Research	12.655	12.555	10.355	0.796%	39
50	--	--	Shoppertrak	12.450	12.218	11.166	1.899%	36

Those in *italics* are estimated or partially estimated figures

Those marked '--' are new entrants

MRS LEAGUE TABLES
TOP 20 FASTEST-GROWING BUSINESSES

2019 MRS LEAGUE TABLES, COMPILED NOVEMBER 2020

2019 RANKING	GROWTH RATE	COMPANY NAME	2019 (£M.)	2018 (£M.)
1	93.759%	Concentra Analytics	13.412	6.922
2	57.363%	Savanta Group	18.701	11.884
3	31.629%	YouGov	41.200	31.300
4	27.117%	Basis Research	13.407	10.547
5	20.595%	Information Services Group	*14.100*	11.692
6	19.151%	Forrester Research	*76.500*	64.204
7	18.304%	Join The Dots/ Insites Consulting	14.956	12.642
8	17.960%	C Space	17.707	15.011
9	17.173%	Ipsos	*264.900*	226.076
10	13.656%	Populus Group	19.684	17.319
11	13.102%	GlobalData	178.195	157.553
12	12.395%	IDC	*47.550*	42.306
13	8.843%	Nielsen	*153.615*	141.134
14	8.674%	Ascential	*48.271*	44.418
15	8.448%	Dynata Global UK	*63.750*	58.784
16	8.406%	The Research Partnership	33.248	30.670
17	8.144%	Wood Mackenzie	226.703	209.631
18	8.058%	Information Resources	*56.750*	52.518
19	7.772%	IQVIA Solutions	*78.113*	72.480
20	7.556%	Firefish	13.081	12.162

Those in *italics* are estimated or partially estimated figures

NOTES ON MRS LEAGUE TABLES

TOP 100 INDIVIDUAL AGENCIES

Entry 63: Quantexa is majority owned by Accenture.

Entry 65: Sparkler became part of PA Consulting Group in mid-2018.

Entry 67: MetrixLab is part of Macromill Group, a global online and consumer insights and analytics group headquartered in Tokyo.

Entry 69: IFF Research acquired Voluntas in mid-2019. Voluntas is a research and customer intelligence agency specialising in the social housing sector.

Entry 71: Consulting at McCann Health. This entry is the UK-based part of the agency which was formerly Double Helix. McCann Health is part of the Interpublic Group.

Entry 82: Kokoro was formerly ABA Market Research.

Entry 85: Engine Transformation was formerly ORC International.

Entry 90: Trinity McQueen acquired Allto Market Research (formerly McCallum Layton) in late 2019.

Entry 92: This result includes full-year impact of the acquisition of Arkenford in 2018.

Entry 95: Pulsar was sold by Cello Health in late 2019 to Access Intelligence, a comms software firm.

Entry 97: This is Motif was formerly Network Research & Marketing.

TOP 50 CONSOLIDATED BUSINESSES

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

Entry 3: Ipsos includes Ipsos MORI, Ipsos Interactive Services and Ipsos Retail Performance. Ipsos' figure reflects in part the acquisition of some businesses from GfK – see entry 18.

Entry 4: Dunnhumby is wholly owned by Tesco plc.

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

Entry 7: Nielsen includes AC Nielsen, Nielsen Media Research, Nielsen Netratings, Nielsen Book Services, and Nielsen Sports. Additional turnover was gained in Nielsen Media Research by the acquisition in late 2018 from Ebiquity of its advertising intelligence business.

Entry 13: In late 2018 Ebiquity sold to Nielsen its advertising intelligence business which had accounted for about 90% of the turnover of its Marketing Intelligence Division.

Entry 14: Informa includes Datamonitor and Informa Telecoms & Media (formerly Ovum Europe). In mid-2019 Informa acquired the IHS Markit TMT portfolio in exchange for its Agribusiness Intelligence Group.

Entry 15: Dynata was created by the merger of Research Now and SSI. The combined business continues to be privately held by Court Square Capital Partners and HGGC as majority owners.

Entry 16: Omnicom/DAS includes Hall & Partners, Flamingo Research, Adelphi International Research, and The Planning Shop International. The result reflects the sale of C Space to Interbrand.

Entry 17: Information Resources (UK) Ltd is a wholly owned subsidiary of ultimate holding company IRI Group Holdings Inc. Vestar and New Mountain Capital have joint control and equal governance of IRI.

Entry 18: GfK's result for 2019 partly reflects the sale to Ipsos in late 2018 of four divisions of GfK Custom Research – Customer Experience, Experience Innovation, Health, and Public Affairs.

Entry 19: Ascential includes WGSN and Edge by Ascential (formerly Planet Retail).

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

Entry 24: ITWP includes Toluna and Harris Interactive. In 2020 ITWP was re-named Toluna Group.

Entry 27: BVA-BDRC Group consists of BVA-BDRC, ESA Retail, Perspective Research Services, Alligator Digital, and Viewpoint.

Entry 31: Populus Group includes Populus, Populus Data Solutions, and BrandCap. At the end of 2019 it acquired Decidedly (formerly FreshMinds). From October 2020, Populus, BrandCap, and Decidedly merged under the new name Yonder; Populus Data Solutions rebranded as Yonder Data Solutions.

Entry 34: Savanta is the insights and intelligence division of Next Fifteen Communications. It was formed in 2019 by the consolidation of MIG Global/Morar HPI, VIGA, Charterhouse, and Circle. In August 2019 it also acquired ComRes and in February 2020 the UK division of Future Thinking.

Entry 36: MMR Research Worldwide is part of MMR Group which has a worldwide turnover in excess of £45m. Within that group, data on the rest of its UK-based turnover was not available for this edition of the league tables.

Entry 37: C Space is now part of the Interbrand Group.

Entry 40: Dentsu Aegis Network (DAN) includes B2B International and Merkle Aquila Insight. In late 2020 DAN announced a name change to Dentsu International Ltd, and the formation of a new agency called Merkle B2B pulling together five subsidiaries.

Entry 41: In late 2019 Kynetec announced its merger with Kleffmann.

Entry 44: Join The Dots was acquired during 2019 by Insites Consulting. In 2020 the joint enterprise was re-named Insites Consulting UK.

WHAT IS THE STERLING VALUE OF THE UK RESEARCH INDUSTRY?

David Cahn, principal at synygis consulting

Following a reappraisal of the published evidence, MRS now estimates that the UK research insight and analytics industry has a sterling value of at least £7bn, a +40% uplift on the previous estimate of £5bn. This expanded industry it is estimated employs at least 64,000 workers, in at least 4,000 enterprises.

The UK research insight and analytics industry, 'the business of evidence,' has been succinctly characterised elsewhere in this report as the: "monitoring, measurement, and understanding of markets and societies in support of well-informed and evidence-based decision-making".[1]

[1] This Report, p5

WHAT IS THE STERLING VALUE OF THE UK RESEARCH INDUSTRY?

The revision does not indicate a sudden substantial organic growth in the industry: but rather that the boundaries of what business activities our industry encompasses are continually being re-evaluated and expanded.

MRS' revised estimate utilises the Standard Industrial Classification (SIC) code, a mandatory requirement for all companies to self-select when their business is first registered. Companies can select at least one SIC code (up to a maximum of four), to declare the type of economic activity in which they are engaged. The two codes that are specific to the research industry are 73200 (market research and opinion polling), and 72200 (research and experimental development on social sciences and humanities).

The updated estimate is built from two reliable, published data sources: the Annual Business Survey (ABS) conducted by the Office for National Statistics; and the MRS League Tables of the largest 100 research firms, published in this report.

The ABS is conducted each year among a sample of c.73,000 businesses, randomly selected by SIC code within area from the universe of c. 2.5m non-financial businesses. The turnover estimates derived from the ABS will vary year to year - the sample is drawn afresh for each annual cycle, so is not a time series.

ABS analyses the sterling turnover of companies within more than 700 SIC codes. The latest survey, updated in May 2020, estimates that the sterling value of UK businesses choosing SIC code 73200 is £5,086,000,000. A further £417,000,000 is generated by firms with SIC code 77200.

However, there are a great many firms operating inside 'the business of evidence' arena who have not self-specified SIC codes 73200 or 72200, and the other SIC codes they have chosen are also used by businesses which are outside the research/insight/analytics sector. Thus, they cannot be separately identified in the ABS estimate of the sterling value of each SIC code.

Fortunately, SIC code categorisation can be applied to the MRS League Tables. The tables are compiled each year from annual reports, statutory Companies House returns, the trade press and relevant websites.[2] Agencies also have the opportunity to send their turnover data direct to the MRS League Tables compiler (see page 6).

The top 100 businesses in 2019 returned a sterling turnover of £3,756,000,000. £1.931,000,000 was generated by 67 firms with a SIC code of 73200, or 72200; and the remaining £1,825,000,000 sterling value was generated by 33 businesses that are active in the research sector but who are classified under SIC code(s) other than 73200 or 72200. Examples of these codes include 62090 (other IT and computer services), 70229 (management consultancy) and 82990 (other business support services).

"THERE ARE A GREAT MANY FIRMS OPERATING INSIDE 'THE BUSINESS OF EVIDENCE' ARENA WHO HAVE NOT SELF-SPECIFIED SIC CODES 73200 OR 72200."

WHAT IS THE STERLING VALUE OF THE UK RESEARCH INDUSTRY?

The SIC 73200 and 72200 firms in the ABS, together with the 33 firms who are not SIC 73200 or 72200 in the top 100, brings the total to £7,328,000,000. This is already a conservative estimate. The inclusion of just some of the many smaller enterprises not featured in the MRS League Tables that do operate within 'the business of evidence' but which do not self-classify under SIC code 73200 or 72200, will expand this estimate of industry turnover value yet further.

HOW MANY WORKERS IN THE UK RESEARCH SECTOR?

Business population estimates developed for the government's Business Register and Employment Survey 2019[3], suggest that c. 47,000 people work in companies with SIC codes 73200 or 72200, of which 33,000 (67.8%) are full-time, and 14,000 (32.2%) part-time. This is so close to the national average of 68.5% / 31.5% that we can reasonably pro rate from (£5.086b+£0.417b) to £7.328b to estimate that the total UK research sector employs at least 64,000 workers, of which c. 45,000 are full-time, and c. 19,000 are part-time. This implies an average turnover generated per worker of c. £110,000.

The sub-Top 100, non-SIC 73200/72200 company workforces are not yet included in this estimate. Nearly three quarters of the SIC 73200/72200 companies have four or fewer workers, very much in line with the national average.

HOW MANY ENTERPRISES IN THE UK RESEARCH SECTOR?

The Inter Departmental Business Register[4] is the primary reference for SIC codes and is the sampling source for the Annual Business Survey. It is built mainly from HMRC VAT and / or PAYE records, supplemented by information from Companies House.

The current register indicates that there are 3,310 enterprises with SIC code 73200, and 615 with SIC code 72200. Adding in the 33 non-SIC 73200/72200 enterprises identified in the table of Top 100 Individual Agencies Ranked by Turnover yields at least 4,000 enterprises engaged in 'the business of evidence'.

That is before taking into account any sub-top 100, non-SIC 73200/72200 enterprises.

"THE SIC 73200 AND 72200 FIRMS IN THE ABS, TOGETHER WITH THE 33 FIRMS WHO ARE NOT SIC 73200 OR 72200 IN THE TOP 100, BRINGS THE TOTAL TO £7,328,000,000."

[3] Details are at: http://www.ons.gov.uk/employmentandlabourmarket/peopleinwork/employmentandemployeetypes/datasets/industry235digitsicbusinessregisterandemploymentsurveybrestable2

[4] Details are at: https://www.ons.gov.uk/businessindustryandtrade/business/activitysizeandlocation/datasets/ukbusinessactivitysizeandlocation
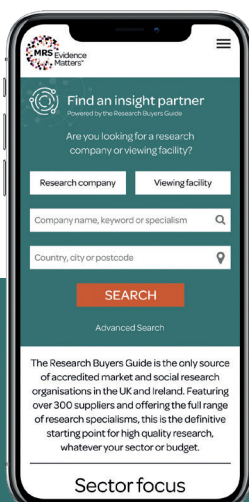
MRS CEO Pledge

Manifesto for Opportunity

The **MRS Manifesto for Opportunity** asks CEOs to make five commitments towards creating safer and more representative workplaces.

The CEO pledge includes:

Publishing pay statistics annually

Working towards government targets for women and ethnic minorities at board level

Improving recruitment practices.

Research buyers can now search for suppliers that have signed the CEO Pledge on the new Research Buyer's Guide.

Go to mrs.org.uk/directory

VIEW FROM A RECRUITER

Sinead Hasson, managing director, Hasson Associates

What a year. We have never had one like it before, and hopefully there won't be another.

The year started with a lot of trepidation about Brexit and IR35 and how we would cope with any changes. Then we started to see an impact from the downturn in business in Asia as Covid-19 began to grow.

By the time the UK was officially locked down in March, we had already begun to see a drop off in new vacancies. Then as soon as we locked down, 80% of open vacancies were pulled.

HASSON
ASSOCIATES

SPONSOR

This means more than no new roles. This means no movement in many agencies, no promotions, no hiring to fill a need caused by someone else's departure. In terms of development for people and businesses, it was a very slow grinding down to an almost dead stop. It took a lot of time for people to work out how to work from home, and for larger/less agile firms this cost a lot of valuable time.

The furlough scheme helped avoid hard redundancy decisions, but unfortunately many redundancies still happened as an inevitable consequence of a loss of business.

By the summer, things began to stabilise, and companies again felt confident to start hiring again.

Technology helped – pitching and presenting on Zoom from and to multiple locations became common place, and it worked.

From a recruitment point of view, the talent professionals in the industry quickly stepped up, and video interviewing and virtual onboarding are now commonplace and successful. Logistically it can often be a challenge, but many people have moved jobs in the last nine months and agencies with the need are able to confidently grow their teams.

Of course, there are strong sectors untouched by this downturn – cyber security, finance, healthcare amongst them. Those companies who were the most innovative in terms of data collection technology were really able to thrive.

Our advice to people in the market research industry, particularly those in the agency world is you need to be more versatile. If you are a qualitative researcher, learn how to appreciate quant and vice versa. Get over any fear you might have of business development – you are going to need it. If you are in data science, be on top of all new techniques and programmes. Overall, be commercial; understand business and corporations – they will be your clients and you need to know how they work if you are going to serve them well.

The industry is also taking steps forward in terms of diversity and inclusivity. The newly established MRS Diversity, Inclusion and Equality Council and the newly established CORe means that we are moving in the right direction to create a better future for the industry.

However, this is primarily a people business, and we have seen really great moves from companies who are caring for their people. Those business will have continued employee loyalty that will carry them through the next challenge – recovering from this pandemic.

PERSPECTIVES FROM THE FASTEST GROWERS

Katie McQuater, editor, Research Live & Impact magazine

> It is reassuring to see research businesses continuing to grow, despite continued economic uncertainty.
>
> Looking at the top 20 fastest growing agencies table (page 11) reminds us that growth is feasible for different types of business, for varying reasons, whether growth is organic or through acquisitions.

While this year's tables are based on 2019 financial data, and so do not take into account any Covid-19 impact, the continued upward trajectory points to a positive trend of growth and resilience in the industry, suggesting a strong position prior to the onset of the pandemic.

Savanta was formed in 2019 by the consolidation of MIG Global/Morar HPI, Viga, Charterhouse, and Circle. That year, it also acquired ComRes and in early 2020 it bought the UK division of Future Thinking.

Growth has come from an equal focus on investment internally and externally, says chief operating officer Paul Bath. "Through that combination we've been able to build out our industry specialisms, methodological expertise, products and tech capabilities."

PERSPECTIVES FROM THE FASTEST GROWERS

Bath says around half of the agency's growth has been organic, while the other half has stemmed from its acquisitions. "Organically, we've always invested in our people, tech and product development which are primary drivers of growth," he says. "We've also had a strategy of international expansion and have had good success in taking our offering to the Americas. We've always been interested in teaming up with other research businesses who share similar culture. In doing so this has helped us to accelerate the development of new areas of expertise and has given us access to some exciting new clients and impressive talent."

IFF Research's growth has largely been organic, but the company also added specialist housing research agency, Voluntas, to its business in 2019.

Building a stronger relationship with clients and a renewed focus on "listening more" has worked well for the business, according to managing director Jan Shury, contributing to the growth it experienced in 2019. "This has helped us secure more and bigger projects with existing clients, as well as extending our reach to new ones," he says.

Investment in staff has been key, says Shury. "We recognise that to deliver the best research, we need the best people and for them to be happy in their roles and with us. Over the last year we've redoubled our efforts to ensure we offer a supportive and inclusive culture which allows us to attract, nurture and retain a great team." The company also transitioned to a home-working interviewing panel which has helped it to successfully deliver large contracts and bolstered its resilience when the pandemic hit in early 2020, adds Shury.

THE IMPACT OF 2020

Everyone we spoke to for this analysis noted that 2020 was a challenging year for the industry, with the pandemic likely to have considerable implications for the market for some time. With some client sectors, such as travel and retail, almost at a standstill due to Covid-19, there was more pressure than ever on budgets and margins, while research businesses grappled with the various challenges associated with social distancing restrictions.

"Like many other agencies, growth has been the last thing on our mind during 2020," says David Alterman, chief operating officer at The Nursery Research & Planning. "Almost all of our efforts have been focused on supporting existing clients and making sure we could continue to deliver good quality work, while investing a huge amount of management energy and time into maintaining morale, physical and mental health, and a sense of humour amongst the team. Changing circumstances have forced us to adjust and adapt and some new business opportunities have come through as a result – for example, in the development of our online qual business."

Alterman says the company has continued to increase its investment in marketing and focused on generating new business from sectors that have stayed resilient during the year's lockdown restrictions. Both existing and new clients remain "central" to the agency's efforts, he notes.

While many have faced difficulties, in some cases changes in working habits have improved business relationships. Alterman says the company has found clients working from home "generally more receptive" to targeted new business activity than they might have otherwise been. He adds: "We have been able to spend more quality time with existing clients, as they find more time in their working days and seem to

appreciate proactive offers of help which has definitely helped strengthen some of these relationships."

For Ipsos MORI, there has also been a focus on maintaining existing relationships – chief executive Ben Page explains that "staying close to our existing clients, rather than chasing after new ones in the aftermath of the first wave of the pandemic" worked well for the business in 2020.

However, some client sectors saw growth during the pandemic. "We have seen massive growth in communities, in analytics and advisory services, and also in sectors like government and healthcare – unsurprisingly, as they are the people at the front of the response to the pandemic," notes Page.

Discussing how the industry has fared generally, Kathryn Blanshard, managing director at C Space, says business conditions have steadily improved. "It feels as though the market is beginning to recover, although we predict that there will be less switching between providers and instead clients entrusting their agencies with more [rather than] taking major changes, with more uncertainty looming with both Covid-19 and Brexit."

Bath points to an increase in digital research methods: "Demand for certain services such as face-to-face research remain well below historic levels, but we've seen increasing demand for alternatives such as online qual."

Squeezed budgets and client furloughs have added to the pressure for agencies, says Alterman. "I think the biggest dynamic at play was that insight staff in client companies seemed to be near the front of the queue for the Job Retention Scheme, so there simply weren't people available to commission the research even if there was some budget left."

Populus underwent a merger with BrandCap, Decidedly and Populus Data Solutions in October 2020, rebranding as Yonder. Co-chief executive Michael Simmonds says: "Clearly, Covid-19 brought challenges for the industry, particularly in the second quarter. Despite the rise of online research in recent years, a lot of fieldwork still needs to be completed face-to-face – something lockdown put a stop to. Business steadied in September, however, and is pretty much back to normal now."

WHAT DO CLIENTS WANT?
The pandemic has accelerated existing trends, with previous 'nice-to-haves' now essential.

"We see clients looking for a more integrated approach to methodology, with a focus on data," says Blanshard. "We also see clients wanting to work in a more integrated way with us – our team has had to get a lot closer to the critical business decisions that clients have been making in order to advise them during the crisis. These trends were here pre-pandemic but have sped up in the crisis."

Lynsey Showman, head of business development at Basis Research, says business conditions have not been as bad as some in the industry had feared. "Arguably it's put research in the spotlight more than ever as clients scrambled to understand market sentiment like never before. That said, it's more competitive than ever – this year has accelerated the trend of clients demanding more for less, faster."

Clients are also falling back on trusted rosters, according to Showman, while the type of work has shifted. "In qual, the shake-up has been a good thing in forcing us to rethink established methodologies."

With many clients facing increased pressure to work iteratively, Showman says growth will come from "making more out of what's available" and "working closely with additional sources to present a cohesive narrative back to clients, especially customer data. Using insight to explain the 'why' behind the 'what'."

LOOKING FORWARD

In this report, MRS estimates that the UK research, insight and analytics industry is now worth at least £7bn – up 40% from a previous estimate of £5bn. So, where do our contributors think the industry will flourish in 2021?

For Blanshard, the industry's success will hinge on its ability to position itself as a source of competitive advantage for brands as they recover from the pandemic. She says: "This means us as agencies leaning into the trends that have intensified during this phase: working in an agile way as an extension of client teams, ability to work across datasets and help brands to empathise with customers in a human way as we move into a new phase of the Covid-19 crisis and Brexit in 2021."

Shury says: "If the pandemic has shown us anything, it is how interconnected the world is in terms of sectors, people and ideas. Areas and subjects where we can understand and explore the joins, or make use of them, are likely to offer great opportunities for new work."

There are opportunities both overseas and in terms of innovation, according to Bath. "At a geographic level we see a big immediate opportunity in the Americas, where we have a much smaller footprint than in the UK, and within Apac where growth rates are anticipated to be higher.

"At a service level, with traditional market research seeing low to negative growth rates, we have to look to continue to innovate, differentiate and raise awareness of our offering and expertise." On a practical level, this will involve increased use of dashboards and do-it-yourself functionality, as well as increased mobile optimisation, adds Bath.

Alterman doesn't point to a particular methodology but predicts agencies' role will be "offering sound advice to businesses that help them understand what has changed for ever and what will return to normal".

BREXIT

None of the agencies we spoke to reported having yet experienced any significant impact of the UK's departure from the European Union. "But there's still time", says Bath. "Covid-19 shows us just how unpredictable the world can be."

Page points out that certain concerns have not played out yet: "So far, it appears worries about cross-border data handling, and even access to talented people were overblown," However, he adds: "Only the paranoid survive, though – we will have to see what the cumulative economic impacts of Brexit are."

It is possible that Brexit impacts could have been shielded by the wider damaging effects of the pandemic, notes Showman. "It's hard to attribute all current market fluctuations to Covid-19, when some may also be Brexit-driven, camouflaged as Covid-19."

Yonder co-chief executive Manfred Abraham agrees it is currently difficult to differentiate between the two, but strikes an optimistic note: "British businesses are a resilient bunch; and we're confident that 2021 will bring with it more stability, and more opportunity as well."

THE CLIENT PERSPECTIVE

Katie McQuater, editor, Research Live & Impact magazine

> Research agencies are acutely aware that their growth hinges on the success of the client organisations with which they partner.
>
> Collaboration has come to the fore during the past year, with insight teams rallying to support their businesses and working closely with agency partners.

At BT, there has been a "real sense of coming together to help connect in some tough circumstances", says insight director Georgina White. The company's insight team and its agency partners have worked together to respond to challenges, often to rapidly adopt new business models.

Covid-19 also put Carlsberg's insight team "in the spotlight", says Jenny Syddall, the group's global insights and analytics director. Working to maximise the various specialisms meant the team honed its "core researcher skills" – which was necessary, as it was required to "to synthesise lots of information and provide guidance at breakneck speed."

Syddall also says suppliers moved quickly to establish information sources, providing Carlsberg with "vital data and learnings from across the globe".

There has been an "acceleration of digitisation" at Vodafone during the last year, with the pandemic acting as a catalyst, says Mike Taylor, the company's head of insight. "Some more traditional stakeholders might have been reticent about online qual forums, etc – adopted through necessity – and are now strong advocates."

Speed and flexibility have also worked well for Aviva's approach to insight during the pandemic. Rhea Fox, head of marketing, retail GI at Aviva, explains: "Qualitative listening and social buzz have been extremely important, using both our internal and external panels and our voice of the customer programme."

Synthesising material from across different sources will be a priority for Aviva in 2021, says Fox. This includes translating evolving market developments and consumer reactions, but also "better dissemination of existing knowledge", she adds.

Carlsberg will also have an emphasis on existing data in the coming year. "Our primary focus for 2021 will be on strengthening our data ecosystem. Within our function we have a number of data streams, but there is a need to better integrate these datasets, eliminating data silos," explains Syddall. This will require significant work in terms of data governance, management and databasing, and the team is also planning to reassess some of its foundational insights platforms in light of the ways in which people's lives have been impacted by the pandemic. "Be it segmentation or brand performance tracking, our primary frameworks will have to adjust to the changing category landscape," adds Syddall.

Following the acquisition of TI Media by Future, insight director Richard Thomas will be focusing on establishing an insight function. "Covid-19 means we start lean, but it has also shown how we can adapt approaches in the light of this unique challenge," he says. "Our output during lockdown was particularly prodigious and gratefully received by commercial teams who were desperate to have a compelling narrative to engage clients and agencies with."

When it comes to research methods, these will be mixed, and the team will not put all of its insight eggs into one basket, adds Thomas. "As ever, commercial priorities will dictate how I deploy insight resource, expertise and budget."

The company prefers to work with insight-led, more consultative agencies, says Thomas; "Folk who care about understanding and uncovering human truths, integrating with our business in order to understand the challenge at hand, and applying a keen commercial edge throughout." It also wants to work closely with partners on key projects, "not brief them and see them three months later for a debrief."

Google tends to take a blended approach with its research projects and will choose the best method for a particular objective – often that means focusing on specialisms. Jonny Protheroe, head of UK market insights, explains: "If we require particular pockets of knowledge or methodological expertise then we often work with agencies with deep specialisms, for example on the topic of sustainability, or in the field of behavioural science. But we also partner with larger agencies that can deliver international scale. I expect it will continue to be a blend in 2021."

For many organisations, a reassessment of budgets and research projects will increase scrutiny of the methods used, according to White. "Clients will look at budgets and projects to really ensure they are maximising value, and for those projects that are less certain, it is likely to have consequences. This in turn will drive focus into looking at other areas that can help solve business problems such as internal data and machine learning options, social media and digital data sources."

"OUR PRIMARY FOCUS FOR 2021 WILL BE ON STRENGTHENING OUR DATA ECOSYSTEM."

JENNY SYDDALL, CARLSBERG

"WE LOOK FOR AGENCY PARTNERS THAT SHARE OUR VALUES, FOR EXAMPLE REALLY UNDERSTANDING THEIR COMMITMENT AND PROACTIVE ACTIONS FOR CREATING DIVERSE AND INCLUSIVE ORGANISATIONS."

GEORGINA WHITE, BT

She adds: "Skills-wise, focus needs to continue to drive agile into agency and client teams. Too often, agile is seen to be doing things faster, as opposed to new ways of working – although we all know pace of insight continues to accelerate, too."

GETTING NOTICED

What can agencies do to be better noticed by clients in 2021? For Google, it's about inclusion – in two senses. "Firstly, being able to provide a diverse project team that makes sense for the brief," says Protheroe. "Secondly, being able to deliver a diverse and inclusive research sample and analysis approach that reflects the diverse range of consumer opinion, not just the prevailing or average opinion."

Being a trusted partner who adds value and shares values is key for White. "If you're not already on the client roster, have a very clear point of differentiation on how you add value. Additionally, we look for agency partners that share our values, for example really understanding their commitment and proactive actions for creating diverse and inclusive organisations."

For Fox, agencies should be able to demonstrate how their methods contribute to accuracy "in these strange times in which consumers are – potentially – ever less able to articulate how they are feeling". She adds that agencies should focus on their specialist sectors.

In addition to offering a clear point of difference or speciality, Thomas says: "Be good people to work with, be that extension of a client insight or research team. Showcase your best work, show us your wares."

Carlsberg typically looks for agencies that either specialise in a particular area or can work at scale across multiple markets and projects. Syddall also points to commercial nous. "It's an age-old discussion in the industry amongst clients, but we continue to value agencies that can bring true market, category and 'business' understanding to the conversation. We still see an imbalance in some agencies too focused on method and technology, rather than what the learnings, outcomes and communications of knowledge can help the business achieve – most obviously, understanding consumer behaviour and customer choices, especially in a world thrown into chaos. Those partners that 'get it' truly stand out."

Taylor makes a plea for more evidence of effectiveness, asking agencies for "fewer general creds about how you are really a consultancy, and more fascinating research – even small scale – case studies from the real world."

INSIGHT IN 2021

Most of our contributors either report that insight has grown in influence during the past year or anticipate a big opportunity for 2021.

"Demand for insight has remained high throughout 2020 and indeed Covid-19 highlighted this further, particularly in regard to customer closeness, strategic intent and foresight – and this is likely to remain," says White.

However, the post-pandemic business reality will mean insight directors have a harder fight on their hands. "I think we'll have greater influence, visibility and opportunity to make a difference but have to fight harder for headcount and budget," says Fox. "Consumers and businesses are likely to be having a hard time in 2021 and that will impact budgets, making it more difficult for the strategic disciplines to compete for budget vs 'working' dollars. Insight people both agency and client-side are going to have to bring their 'A game' to 2021."

The events of 2020 have increased the influence of insight within Google, says Protheroe. "It has never been so important to bring the outside world in, and to understand how we can be helpful to our users and customers in a time of crisis."

He doesn't expect business conditions for market research to quickly return to normal in 2021 due to economic uncertainty, but adds: "2020 was a forced experiment that produced a lot of learning, and it was encouraging for the future of research how the industry was able to pivot towards more online and remote methods while still delivering vital insight to businesses."

Taylor says it will be important to revisit assumptions in light of Covid-19. "Some past assumptions and learnings can't be taken for granted, so we should see insight become more essential than ever." This is unlikely to translate to "ever-increasing budgets", however, he adds.

"We will need to demonstrate the value of every euro spent," says Syddall. "This is by no means unique, but there will be a doubling down on this. However on a more positive note, we stood up well to being in the spotlight in 2020, so the equity of our function and relationship with our business partners is strong, which is a good base to build on in 2021."

When asked what she expects business conditions to be like in the coming 12 months, Syddall points to flexibility. "Last year when asked this question, I said that we need to be flexible in the face of unpredictability, in that we increasingly see that the unexpected becomes our new reality. It feels like a good summing up of 2020, so I will stick with this for 2021, too."

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RHEA FOX, AVIVA

MRS PRESIDENT'S MEDAL 2020

An interview with Professor Sir David Spiegelhalter
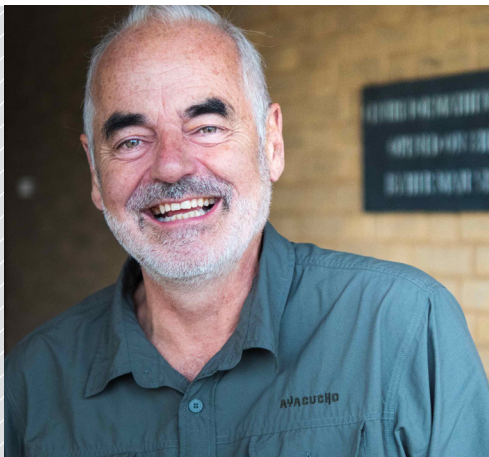
Sir David Spiegelhalter has just been awarded the MRS President's Medal 2020 for his work establishing the power of statistics in the public domain. He has spent decades promoting the dual ideas that decision-makers need to develop a culture of acting on evidence, and that researchers need to communicate this increasingly more complex evidence effectively.

YOUR OWN PROFILE HAS BEEN RAISED DURING THE PANDEMIC – AS A 'STATISTICS GURU' WHO OFTEN APPEARS IN THE MEDIA. HAS THIS HAD AN IMPACT ON YOU PERSONALLY?

I've had to become a bit more resilient to criticism, but I freely mute or block impolite people on Twitter. It's been interesting to be constantly asked to appear on radio or TV, and talk to journalists, but I've got used to turning nearly everything down – it's a 'sellers market'!

YOU POST REGULARLY ON TWITTER – DO YOU THINK SOCIAL MEDIA PLATFORMS ARE TAKING ENOUGH RESPONSIBILITY FOR THE CONTENT POSTED ON THEIR PLATFORMS?

I think social media should take some responsibility for content, and the US election has seen them make rapid changes that I hope will feed through into vaccine misinformation. But obviously care is required.

MRS PRESIDENT'S MEDAL 2020

IS THERE A RISK OF 'STATS BLINDNESS' AMONG THE GENERAL PUBLIC – WHERE IS THE BALANCE BETWEEN A USEFUL AND TIMELY DISPLAY OF DATA AND STATISTICAL OVERLOAD?

As I have said, communicators need to avoid 'number theatre' – numbers should be used to inform and not persuade, and so should be used sparingly, allowing those interested to drill down.

YOU WERE OUTSPOKEN ABOUT A RECENT GOVERNMENT GRAPH THAT DISPLAYED OUT-OF-DATE PROJECTIONS FOR 4,000 DEATHS A DAY OVER THE WINTER. IS THERE A PLACE FOR USING FEAR IN GOVERNMENT COMMUNICATIONS TO INFLUENCE BEHAVIOUR?

No. The public deserves to be treated with respect, to hear things as they are, and not have their emotions deliberately manipulated.

HAVE YOU SEEN AN IMPROVEMENT IN THE WAY JOURNALISTS REPORT DATA?

I think they have upped their game, across the board. There has been some excellent reporting.

SOME CITE THIS PERIOD AS BEING A RENAISSANCE FOR EVIDENCE AND EXPERTS - HOW HAS THE REPUTATION OF STATISTICS AND EVIDENCE FARED DURING THE PANDEMIC?

Statistics has done well, as statisticians are generally seen as being neutral and without agendas. Modelling has done less well, as it is doing something different, and the use of 'scenarios' has been fairly disastrous. And I think people are now much more aware how flaky evidence can be.

THIS IS A GLOBAL PANDEMIC – HOW COULD WE IMPROVE THE WAY STATISTICS ARE USED AND SHARED AT AN INTERNATIONAL LEVEL?

Our World in Data have shown the way to do this – an extraordinary resource and achievement.

DOES A CAREER IN STATISTICS RESONATE WITH YOUNG PEOPLE TODAY – COULD MORE BE DONE TO ENCOURAGE TALENT INTO THE PROFESSION?

Talent is coming in droves, especially if we include data science. The subject is booming, quite rightly.

ARE YOU STILL THE REIGNING WORLD CHAMPION IN LOOP (A VERSION OF POOL ON AN ELLIPTICAL TABLE)? WHAT WOULD BE THE ODDS ON YOU VERSUS TIM HARTFORD (WHO IS ALSO PRETTY GOOD WE HEAR)?

I suppose I am, as I don't think there has been another competition! I would love to play Tim - although I am sure he would win as I was rather lucky last time.

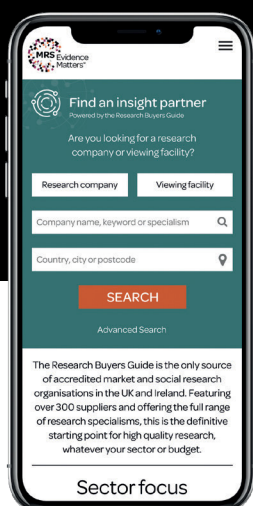**WHAT DO YOU MOST MISS FROM YOUR PRE-PANDEMIC LIFE?**

Seeing family when and how I want. Having long trips to India.

You can see all the winners and finalists of the MRS Awards 2020 **here**.
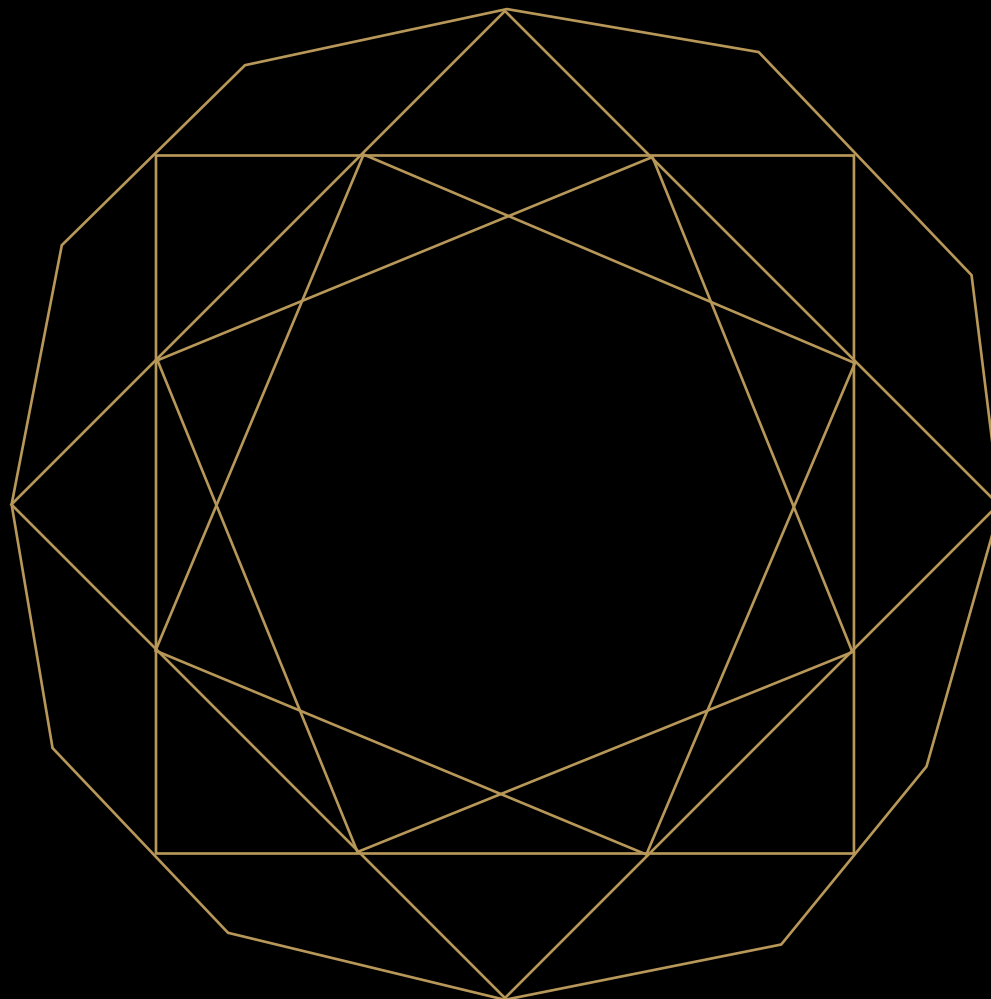
MRS
AWARDS
2020
WINNERS!

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to all our winners

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won MRS Awards on the new Research Buyer's Guide.

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