Global Market Research 2022

An ESOMAR Industry Report

in cooperation with BDO Advisory

ESOMAR
1947

Global Market Research 2022

An ESOMAR Industry Report

in cooperation with BDO Advisory

ESOMAR is the global voice of the data, research and insights community.

With more than 6,000 individual members and over 550 corporate member companies in 130+ countries, we represent more than 40,000 professionals currently working in the data, research, insights, and analytics profession – and all those who use research for informed decision-making.

ESOMAR has been providing ethical and professional guidance and advocating on behalf of its global membership community for over 75 years. To facilitate this ongoing dialogue, ESOMAR creates and manages a comprehensive programme of industry-specific and thematic events, publications and communications as well as actively advocating self-regulation and the worldwide code of practice.

ISBN 978-90-9036554-1

Published by ESOMAR, Amsterdam, The Netherlands
For further information, please call + 31 20 664 2141 or email intelligenceunit@esomar.org

Contents

Foreword

Welcome to the Global Market Research Industry Report

The output of the industry will exceed USD $130 Billion by 2023!

It may sound like clickbait, but that is ESOMAR's expectation from/for our industry this year.

You may very well ask how.
The Global Market Research (GMR) report *(yes, we are still proceeding with the legacy name for now)* is projecting a K-shaped market recovery. Performance data shows countries are recovering at different rates and times.

The GMR report has now become the ready reckoner for our industry. Overall, ESOMAR's Global Survey covers up to 83% of the global Insights Industry. The remaining 17% remains identified by ESOMAR but undeclared by the countries.

This year, the report incorporates more countries. For the first time, the report includes the South Pacific region and Jamaica as a standalone country.

Last year, the theme was "Uncertainty". This year, it is "Towards Clarity" to the distance that we can see. Akin to driving in the dark, depending only on the car headlights, we drive strongly to where we can see clearly. Meter by Meter, the path gets clearer as is our future.

How was this report created?

ESOMAR's Global Survey runs during the second and third quarters of the year in two phases. The first one allows countries to run their local surveys (with or without ESOMAR's assistance), and in the second, ESOMAR collects the data of up to 106 countries and regions. Each year the topics covered, questions asked, and industry categorisations presented are consulted with a Sounding Board of industry professionals. From there, ESOMAR analysts consolidate the data and extract the year's insights... for the Insights Industry.

Here are KEY TAKEAWAYS that will tell you more of the insights from this report. Each of these is a reason for you to pick up the book, read it, and recommend it!

- Overall, the industry has expanded substantially and experienced a year of unprecedented growth. 2021 saw the industry expand 15% from US$ 102 billion to almost US$ 119 billion!
- The tech-enabled sector is the fastest-growing one of the global Insights Industry in absolute terms, at +18.9%. This is particularly true for the US, at +24.3%.
- The established industry shows the strongest recovery in Europe, with an absolute growth of +9.2%.
- At a global level, the established sector represents 39% of the total industry, losing two percentage points compared to 2020. The tech-enabled sector climbs up to 37%, while the reporting sector remains relatively

flat at 23%, giving up one point compared to last year.
- High levels of inflation over 2022 tone down growth expectations to +5.2% in net terms.

This report covers additional information regarding our industry.

Thank you's

The swan floats gracefully on the surface of the lake. What we do not see and therefore do not give due credence to is the work being done below water. The feet are furiously kicking away.

The feet behind this GMR report include the members of the team at ESOMAR's Intelligence Unit who curate this report – Senior Manager Xabier Palacio, Data Analyst Ajitha Gopalakrishnan and of course CFOO Marie-Agnes Mourot –, kindly guided by the wisdom of our Sounding Board.

Furthermore, the production of this report would not be possible without the extraordinary contribution of an ever-increasing number of people. Allow me to repeat my thanks to our Sounding Board, all the Trade Associations, industry experts, interviewees and ESOMAR representatives who unfailingly give of their time to make this report come to life.

I would also like to thank our tireless partners – John Smurthwaite (ESOMAR APAC Ambassador), Jo Bowman (Journalist), Robert Heeg (Journalist), Suzy Young (WARC), the teams at Outsell and DataIM, Matthijs Hooghiemstra (Designer), and Simone van Belkum and Rosalie Vester (BDO) – all of whose contributions are both critical and invaluable to the success of this report.

Our heartfelt thanks to all of them for their continued support to ESOMAR initiatives.

How to use this report?

Flip through sequentially. Or look at specific topics. Check out the changing client types and how clients are internalising research.

What are the global trends? And which type of data (and hence analysis) is going to skyrocket in the coming years?

Download your copy of the GMR today. Read, imbibe, act, and of course, recommend it to others in our industry.

Dr. Parves Khan,
Director General
ESOMAR

Pravin Shekar,
Interim CEO
ESOMAR

[You will notice two people signing this foreword. This underlines the fact that we are looking at a year of change, transition, and growth for our industry. Here's to new beginnings.]

1. Highlights

by Xabier Palacio

1.1 The top line

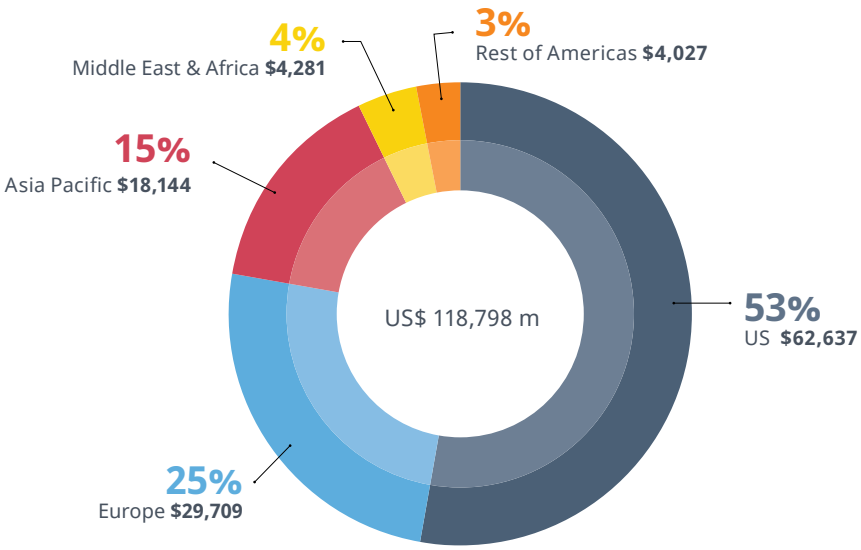
The roller coaster which began in 2020 with the propagation of an invisible enemy – the SARS-CoV-2 virus – continued into 2021 as governments, markets, and the population adjusted to a disease that, authorities predicted, would inevitably become endemic. The shock felt during the first year of the global pandemic gave way to a rebound that, in many markets, helped bring the insights activity back to pre-pandemic levels or output.

At a global level, the industry outperformed GDP growth in Europe, the US, and Asia Pacific, while it lagged behind in Africa and the Middle East regions and the Rest of the Americas (a US-centric division of the continent which includes Latin America and Canada).

The buoyant +10.8% global net growth registered for 2021, substantially higher than the IMF's estimation of +6.1% for global GDP, shows the different realities that exist for every country and every region. The net growth of +12.8% for Europe, +11.4% for the US, and +10.1% for Asia Pacific contrast with the more nuanced yet positive growth of +4.2% for Latin America and -3.8% for Africa and the Middle East.

For many countries, however, these promising growth rates were not enough to regain the ground lost in 2020. As the regional and country data shows, and as individual predictions made in Chapter 1.6 of the Global Market Research 2020 report, recovery from the initial shock of the pandemic has not

Global insights turnover, 2021



followed a unified trend. Instead of an 'L', 'U' or 'V' shaped recovery, it is following a so-called 'K' shaped one, where countries fare very differently depending on a myriad of economic, social and political factors.

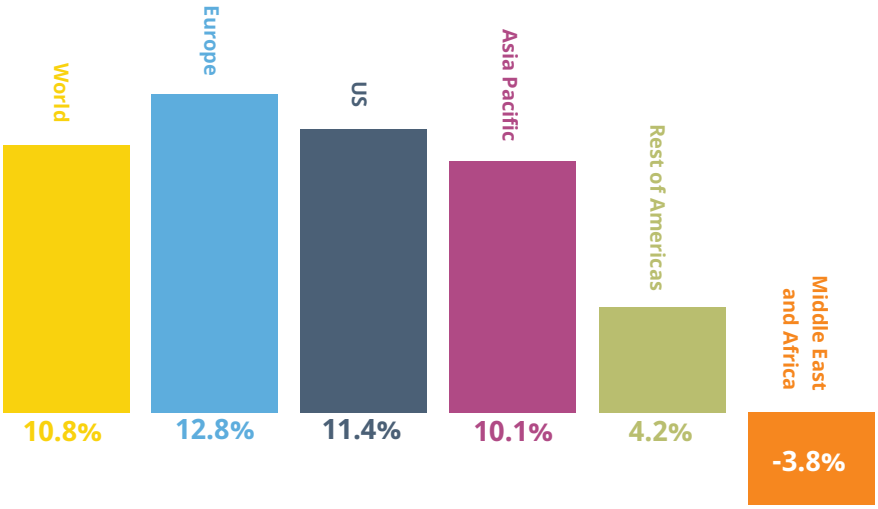
Overall, the industry has expanded substantially and experienced a year of unprecedented growth. Discounting the fact that an improved assessment of the industry made by our independent data provider Outsell led to a higher estimated level of global turnover, 2021 saw the industry expand from US$ 102 billion to **almost US$ 119 billion!**

1.1.2 Regional overview

One of the main moderators for growth during 2021, and one certain to play an ever more prominent role in 2022, was inflation. This was particularly true for those regions that showed historically bigger degrees of volatility: the rest of the Americas with a combined 6.25% of inflation over 2021, Africa with 13.24% and the Middle East with 5.33%. The impact is a lower net growth that, in the case of Africa and the Middle East together, becomes a negative -3.8%.

2022 is starting to show the medium and long-term effects of the shock that occurred in 2020. These kinds of global macroeconomic spasms tend to take some years to filter through local economies. Today, social unrest, political turmoil, high levels of inflation, and disruption of supply chains are the reality many countries have to deal with, not to mention new open armed conflicts.
All things considered, ESOMAR estimates – please see Chapter 9 – that the industry

Net growth rates 2021
(adjusted for inflation)



See chapter 9, table 9.1.4, for further information.

Exchange rate fluctuations eliminated. IMF inflation rates used to determine growth.

will expand during 2022 by +5.2% in net terms (after expected global inflation of almost 7%).

Three countries or areas of the world have seen their turnover return to pre-pandemic levels: the European Union (EU), the UK, and Northern America. In the EU, all 26 countries (we do not collect data on Malta) surpassed in 2021 their declared turnover for 2019, except for France, Finland, Hungary and Croatia. In Northern America, both the US and Canada reported turnovers above the 2019 level – with growth rates above 15% in each case. The UK also declared excellent growth levels and increased its level of output by nearly US$ 2 billion!

The same cannot be said for Asia Pacific, however. Out of the 22 countries included in this region in Chapter 9, only 8 managed to overcome the shock experienced in 2020: China, India, Australia (which provided new estimates after reassessing its industry), Japan, South Korea, Singapore, Indonesia and Mongolia. Please turn to Chapter 1.2 for a deeper understanding of the top 3 countries in the region.

Similarly, Latin America continues to feel the reverberations of the pandemic, and no country with a declared turnover above USD 10 million has yet surpassed the 2019 level of output. Only Panama, Guyana and, potentially, Jamaica (though there is no information on 2019 to confirm this) appear to have made it out of the valley.

Lastly, the situation is analogous in Africa and the Middle East. While coverage of these regions has proven very difficult over the years, from those countries that declared their level of turnover over 2021, no country over USD 10 million in turnover managed to report pre-pandemic levels of output. Only Iraq, with USD 5.0 m in 2021 compared to USD 4.7 m in 2019, appears to have eluded a prolonged shock.

1.1.3 Global established, tech-enabled and reporting sectors

Chapter 3 of the Global Market Research 2020 report presented to the international community the conceptualisation of two different types of methodology – established and technology-enabled[1] – along with the reporting side of the business, which includes secondary research, consultancy, advisory, reports, etc. While some countries remain unable to quantify the size and characteristics of the tech-enabled sector, ESOMAR continues to bridge this gap at global and regional levels through a long-standing partnership with Outsell to independently measure the extended insights industry.

Thanks to this effort, we are able to identify the size of the industry that remains "undeclared" at a global level, which last year sat at 17% of global turnover. As countries include in their local surveys a more inclusive definition of the industry – please review ESOMAR's Global Top-50 Insights Companies 2022 for more information in this area –their

1 (Loosely speaking) Established research: long-used methodologies, with a proven track record and thoroughly refined over time. Technology-enabled research: includes methods that could not have existed without the advent of technology.

improved measurement will help shrink this gap accordingly. The current edition of the Global Market Research report is estimated to cover in its pages the characteristics of up to 83% of the global industry.

The difference from last year, where ESOMAR's coverage was estimated at 86% for 2020, stems from two areas. On the one hand, improvements in the measurement of the tech-enabled sector by Outsell have increased the proportion of undeclared turnover associated with that segment. On the other hand, ESOMAR included in its global questionnaire a question to gauge the number of countries that included either one of the three main sectors in their estimates.

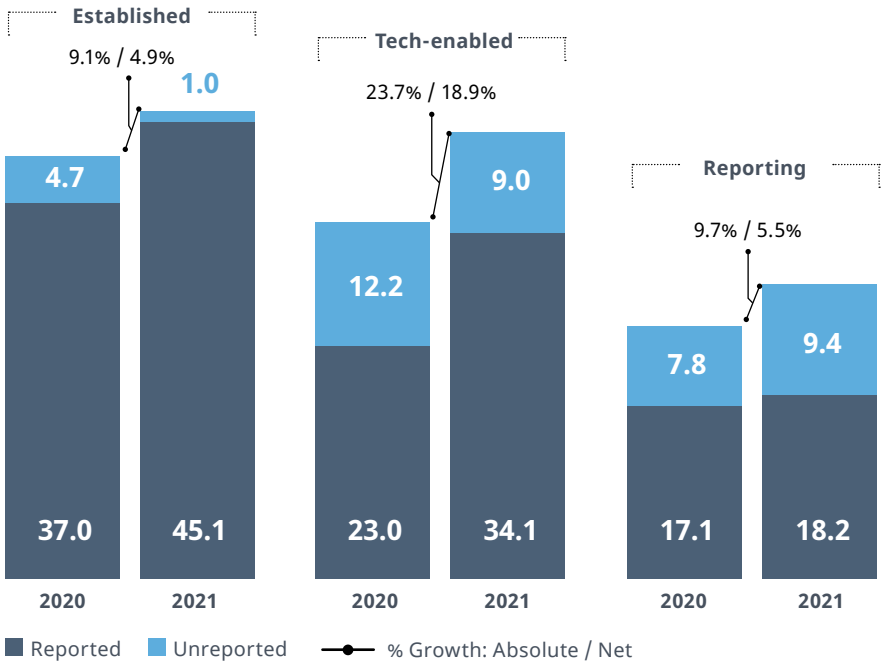
All countries included the established industry in their estimates, naturally. However, less than one-third included the tech-enabled sector, and just one-fifth included the reporting one[2] .

Growth within the industry was primarily fuelled by the tech-enabled sector, where an influx of investments paired with promising returns point to a yet unsaturated market and pushes year-on-year net growth globally to +18.9%. The established and reporting sectors, while also growing at an excellent pace of around +5%, get overshadowed by a technology arm that, in the words of data provider Outsell, "is printing money!" Please, turn to Chapter 2 for more information.

2 Though it should be noted that all three sectors engage in practices related to the other two, as shown in Chapter 9, tables 9.3.2 to 9.3.4.

Estimated levels of global activity

Turnover figures in US$ billion



See global and regional turnover estimates in Chapter 9, table 9.1.5

1.1.4 Expectations for 2022

ESOMAR expects 2022 to witness the further expansion of the industry as it surpasses US$ 130 billion, translating to a global net growth of +5.2%, primarily fuelled by Asia Pacific and Europe, with net growths of +10.4% and +7.2%, respectively. The US will remain the powerhouse of not only the industry but, more precisely, of the entire tech-enabled sector, but the expected high levels of inflation will moderate their expected growth rate to a net +3.0%.

"2022 will see an increasing number of countries escape the 'valley' in output created during the pandemic"

2022 will see an increasing number of countries escape the 'valley' in output created during the pandemic. All countries in the EU are expected to declare higher turnover than in 2019, while in the rest of the region, only Georgia, Armenia, and presumably Ukraine will remain with lower levels of turnover.

In Asia Pacific, we will closely follow the developments of Thailand, Hong Kong, and Taiwan, the only markets with a turnover above US$ 10 million where country informants are expected to take longer than 2022 to return to 2019 output. Cambodia, Myanmar, Sri Lanka and Laos are also expected to return to pre-pandemic levels of output later than 2022.

The situation in Latin America will remain equally uncertain, and neither Brazil, Mexico, Peru, or Uruguay expect a return to 2019 levels of turnover. A similar case exists in Guatemala, Honduras and Nicaragua.

Lastly, in Africa and the Middle East, time will tell whether Nigeria, Tunisia, the Democratic Republic of the Congo or Pakistan declare for 2022 turnover levels above those of 2019.

As the consequences of the serious macroeconomic disruptions of the last couple of years continue to sink into the world economy and society, ESOMAR will continue to keep the pulse of the industry and its developments. And perhaps next year, we will have the pleasure of welcoming an industry with an output in excess of US$ 130 billion!

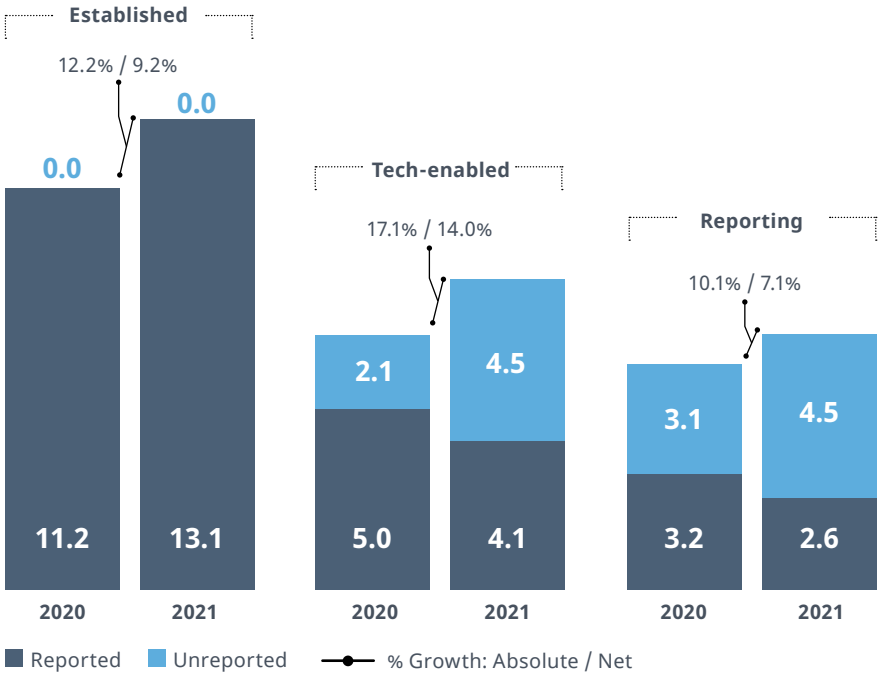
1.2. Regional profiles

1.2.1 Europe

Up to 22 out of Europe's 37 countries covered by this report's data registered a double-digit absolute growth rate during 2021. When adjusted for inflation, however, the 15 countries that made up the European Union on its 1995 enlargement (which includes former member United Kingdom) declared higher growth than the rest of the region. This result mirrors and overturns the same situation during 2020, where the EU15 countries posited the biggest slump in absolute terms. However, the generally higher levels of inflation of the so-called "New EU member states" – not so new anymore – means that their 2020 dip was ever more significant in real terms, and the 2021 recovery slightly more nuanced.

The main engine of growth was attributed to the tech-enabled industry, estimated at US$ 8.6 billion in 2021, or 14% higher in net terms than a year earlier. The ESOMAR's Global Top-50 Insights Companies ranking published in July – also included in Chapter 5 – shows the strength as well as the opportunities for investment and consolidation that exist within this sector.

Estimated levels of activity, Europe
Turnover figures in US$ billion



See global and regional turnover estimates in Chapter 9, table 9.1.5

This year's Global Questionnaire from ESOMAR included a question to specifically understand and measure which of the three main sectors each country included in their estimates – established, tech-enabled and reporting companies. This allows for more accurate sizing of the industry, particularly given the wide use of either kind of methodology by any kind of company. The result is a size of the established sector that, with an estimated US$ 13.1 billion, has a slightly higher baseline than estimated last year. Please turn to the section on Methodology in Chapter 9 for a deeper understanding of the implications of this improvement.

The rebound in growth for the industry is obvious, though high levels of inflation in 2022 will likely tone down growth in the industry back to the single-digit mark.

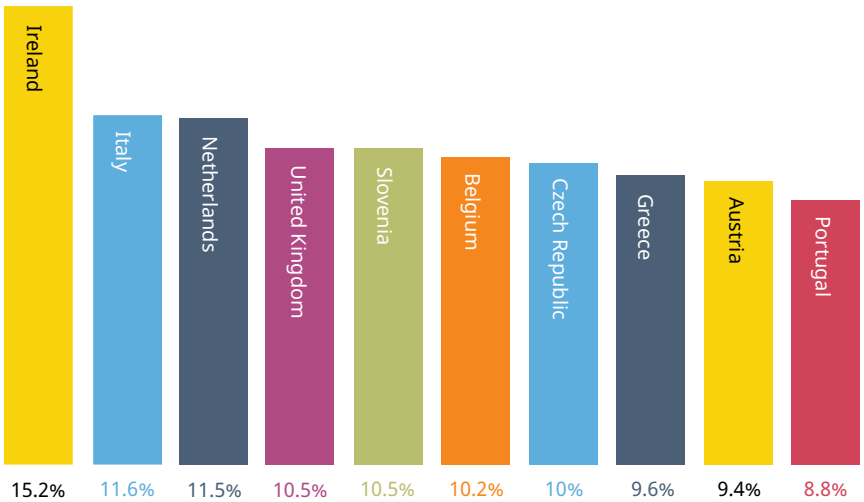
The United Kingdom, the largest market in Europe by a substantial margin, declared a growth level of 10.5% in net terms as the industry recovered from the impact of the COVID-19 pandemic, as face-to-face methodologies returned to the portfolio of services available, and as the profession continued to reinvent itself.

Other countries with double-digit net growth and turnover above US$ 100 million were Italy, the Netherlands, Belgium, the Czech Republic, and Ireland – the latter being the fastest-growing country in the region.

2022 is expected to be a year of normalisation as growth rates take on more discreet levels, and no country expects growth above +9%. Only 6 countries will likely see their turnover decline, four of which are Bulgaria, Croatia, Slovenia and Switzerland. The other two are Russia and Ukraine, currently engaged in a military conflict with worldwide reverberations.

Top 10 Fastest growing markets in Europe

Net growth rates in 2021 (%)



Only countries that participated in ESOMAR's Global Survey, and with a turnover above US$ 10 million.

See chapter 9, table 9.2.1 for country data.

Exchange rate fluctuations eliminated. IMF inflation rates used to determine growth.

Unfortunately, estimating the expected growth of the Ukrainian industry for 2022 proved futile, though we hope the country manages not only to maintain its industrial fabric but to return with renovated energy.

The next section of this chapter lends the space for the largest markets in the region to explain, in their own words, the situation of the insights industry in their country during 2021 and their expectation for 2022. We will follow closely these results and hope to report next year a European market with a turnover in excess of US$ 33 billion!

United Kingdom

Text facilitated by: David Cahn, FMRS, Principal by synygis consulting and Debrah Harding, Managing Director, the Market Research Society (MRS)

Data for the UK kindly provided by: the Market Research Society (MRS)

The Market Research Society (MRS) continually appraises published evidence to estimate the size and reach of the UK research, insights and analytics industry, which it has defined as the monitoring, measurement, and understanding of markets and societies in support of well-informed and evidence-based decision-making.

MRS now estimates that the UK research, insights and analytics industry is worth in excess of £8,050,000,000, a +13.4% uplift on the previous estimate of £7.1bn.

In 2021 the industry bounced back from the COVID-19 pandemic, which had resulted in a shrinkage of -4.7% in 2020.

Face-to-face research returned to the UK in 2021, and whilst not all pre-Covid face-to-face projects have returned to this methodology, it remains an essential approach for the public sector, media measurement projects, and reaching certain segments of the population that are harder to reach via other means such as older participants, some ethnic groups and those without access or knowledge of digital technologies.

Some of the COVID-19 adaptions created in the UK, such as the 'knock to nudge' technique (which was developed using behavioural science to influence participant behaviour, nudging participants to either book an appointment or to supply their telephone number to complete research activities via other modes), continue to be used and are now part of the standard portfolio of face-to-face options being offered to clients. At the same time, online and digital techniques continue to flourish in the UK, and the vast majority of qualitative and quantitative data gathering is now online. Whether more will return to face-to-face data collection is still unclear.

Overall, the COVID-19 pandemic demonstrated the significant strength of the UK industry, including the resilience, innovation and adaptability of UK practitioners and the breadth, strength and depth of the supply chain. The UK industry was creative in developing alternative modes and methodologies during Covid. These have been built upon, enabling suppliers to offer a diverse portfolio of techniques, technologies and modes and using these to broaden the UK industry's offering to the global market.

There is a high demand for talent in the UK, and there is a very vibrant employment market, with a significant number of vacancies, particularly for middle management executives and specialists such as data scientists and analysts. In 2021 a new Market

Research Apprenticeship was launched to support the talent pipeline coming into the research sector, promote social mobility and continue to build a diverse and inclusive sector that reflects the population that market and social research seek to understand.

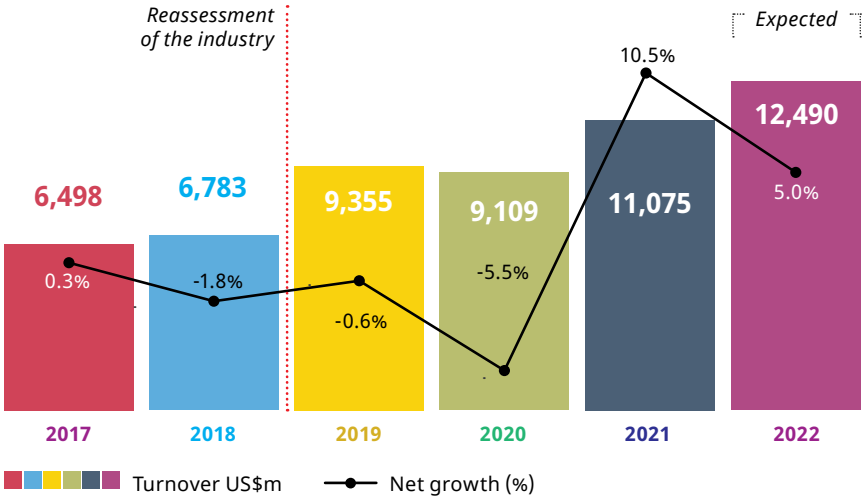
UK employers continued to adopt more inclusive and sustainable practices, with many businesses signing up for the MRS Inclusion and MRS Sustainability Pledges.

To further attract and retain talent, employers have evolved their working practices, largely adopting hybrid, flexible working, which is now a staple for research employers, with many companies opting to use office-based working for specific activities such as group work and innovation. 70,000 workers in at least 4,000 enterprises are currently employed in the UK research industry.

The UK is focused on an ambitious legislative programme to leverage opportunities following the UK's departure from the EU. Chief among these are the planned changes to the UK's data protection regime. Whilst new data legislation is not likely to be introduced until 2023, the UK Government has confirmed its commitment to developing legislation that will support the UK in retaining the EU's adequacy recognition. This will be an important step in providing stability to the UK's data regime and global data transfers.

Looking ahead to the likely outcome for 2022, whilst there had been growing optimism throughout 2021, this is being tempered with some caution among businesses due to increasing fears about a global and domestic recession and the long-term impacts of the war in Ukraine.

Turnover and net growth United Kingdom



See chapter 9, table 9.2.1, for country data.
Exchange rate fluctuations eliminated. IMF inflation rates used to determine growth.

France

Text facilitated by: Syntec Conseil

Data for France kindly provided by: Groupe de travail de l'étude annuelle 2022 pour Syntec Conseil

Syntec Conseil estimates that the French market research and insights industry has recorded annual growth in 2021 of nearly 10% to reach almost €2.4 billion. The French demand for market research & insights was driven by a catch-up effect in 2020. With a 2021 growth of 20%, medium-sized research companies (from € 3 to € 15 million) demonstrated agility and drove the market.

The pandemic accelerated the transfer of face-to-face methods to the internet and mobile mediums, along with a noticeable increase in quantitative methods (+6 points versus 2019) in 2021. Regarding the qualitative methods, face-to-face interviews decreased compared to 2019 in favour of online qualitative methods.

France's main client sector, mass consumption, declined and lost 6 points in 2021 compared to 2020. These clients, nevertheless, need research and studies to cope with their economic issues.

The 2021-2022 activity is slowed down by the available resources to produce. Research companies are going through a transition when faced with a shortage of talent as well as the new aspirations of employees and the Environmental, Social, and Governance (ESG) requirements of their clients.

Applicants are over-solicited, and their demands lead to tension in remuneration. Young talents are more volatile than ever. The search for meaning and professional and personal freedom are significant concerns. Employees already in place also demand new conditions; some start their own businesses, while others choose to retrain into a new job.

To become attractive, research companies question their organisation and encourage the mobility of their resources, promoting intrapreneurship or shareholding. Research companies must strengthen their onboarding process for new employees to make it even more engaging.

To respond to the search for meaning, certain actors try to formalise an ESG approach to limit their internal impacts: social policy, reduction of transport and sponsorship of skills. ESG concerns also stand for a new land of business opportunities – though some research companies natively integrate this ESG dimension into their thinking and offerings. Lastly, to limit the digital pollution of their business, research companies implement actions: awareness programs, days dedicated to cleaning stored data, generalisation of less energy-intensive devices or internal measures to limit their carbon footprint.

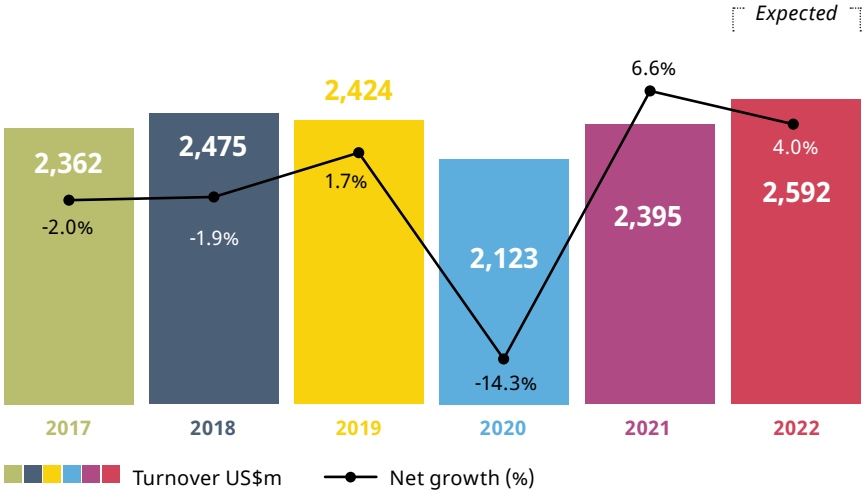
The 2022 business landscape should be driven by a decrease in small tactical studies favouring large fundamental studies. With regard to the 2022 outlook,

the low visibility of market research actors is explained by:

- A post-Covid rebalancing after a good performance of 2021 activity
- A traditional wait-and-see attitude during French election periods
- The impact of the geopolitical context that translates into the caution of customers and delicate negotiations between distributors and manufacturers that significantly strain budgets

In 2022, market research actors will also try to anticipate a possible economic turnaround, the extent of which they do not know.

Turnover and net growth France



See chapter 9, table 9.2.1, for country data.
Exchange rate fluctuations eliminated. IMF inflation rates used to determine growth.

Germany

Text facilitated by: Bernd Wachter, ADM Chairman

Data for Germany kindly provided by: Working group of German and social research institutes e.v. (ADM)

Constant transformation

The market, opinion and social research industry is changing – this is a truism. That's probably the same in every industry, sometimes more, sometimes less, and likely always has been. Nothing is as constant as change. Nevertheless, the speed of transformation is increasing, and the changes are more profound than probably ever before. It took decades to go from face-to-face surveys using a clipboard to establishing telephone market research. Then CAPI, online research, big data, and market research without respondents followed at ever shorter intervals. The market needs to redefine itself and recognise that it is not only survey-based market research that leads to insights. As early as four years ago, in the annual report, ADM asked itself, "Who are we, and if so: how many?". As a result, the association implemented various changes to its statutes to enable membership for software and service providers and the many start-ups. In addition, the term "primary survey" was removed from the statute.

The "global insight industry"

ESOMAR no longer speaks of "market research" but of the "insight industry" and estimates the global market to be around USD 120 billion. The share of "established market research", i. e. classic, survey-based market research, is "only" a good 40 per cent. In contrast, the comparatively young discipline of "digital data analytics" accounts for almost 37 per cent, and the trend is rising.

Transformation drivers

The drivers of change are the self-serve (DIY) approach, digitisation (of collection, analysis and preparation as well as of processes) and insights without respondents. More data, more methods, more analysis options, faster and often even in real-time means more options for the market, opinion and social research sector. The challenges are getting bigger, customer expectations are changing and becoming more diverse, and new "players" with new business models are entering the market.

No reason to throw in the towel! We don't have to be afraid. Because even if the classic, survey-based market, opinion and social research market is stagnating, it will remain and still have a considerable volume (and there is also the possibility of cutting off a piece of the new or larger cake). It has its justification, especially in addition to the "soulless" mass data and automated collection and evaluation procedures. It is required to evaluate and interpret data analyses to check their validity and ability to generalise. Because "a lot" and "fast" and "automatic" are not a benefit in themselves. Without quality (and transparency about it), data is just garbage. There is always the question of the relevance of data and analysis.

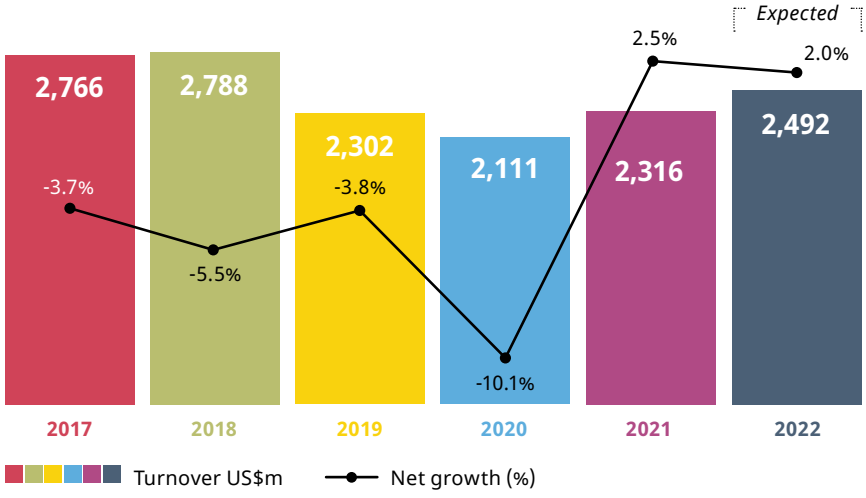
Above all, the established and proven quality criteria of validity, reliability, objectivity and representativeness continue to apply, perhaps more than ever.

What does this mean for industry associations? What does this mean for ADM?

We should by no means say goodbye to the term “market and social research”. We only have to interpret it further and subsume non-survey-based findings under it. The “research” part of the name is indispensable, and under no circumstances should our profession see itself as an “industry” or even describe it as such.

The expanded definition of our sector is accompanied by the consideration and the claim to also represent other than the "classic" market, opinion and social research providers. We should not leave this new, rapidly growing market unregulated but rather absorb and integrate it to retain relevance and sovereignty of interpretation. ADM has taken some first steps along this path with the amendments and additions to the statutes already mentioned. The door is open to panel providers, test studios, field service providers, self-serve platforms and, last but not least, data analysts

Turnover and net growth Germany



See chapter 9, table 9.2.1, for country data.
Exchange rate fluctuations eliminated. IMF inflation rates used to determine growth.

1.2.2 North America

United States

Text facilitated by: Insights Association

Data for the US kindly provided by: Melanie Courtright, CEO, Insights Association, and Cindy Neumann, Director of Research, Insights Association, with contributions from Michael Brereton with the Master of Science in Marketing Research Program at Michigan State University, as well as ESOMAR and Outsell

The U.S. Insights & Analytics market experienced a substantial rebound in 2021. The industry realised growth of 16.6% in 2021 vs 2020, compared to 5.7% growth for 2020 vs 2019. Recall that 2020 market performance reflected widespread business disruption; years prior to that typically experienced just shy of 10% growth.

The continued expansion of the U.S. Insights & Analytics industry during 2021 once again supports the phenomenon of U.S. businesses' ever-increasing demand for customer-focused, fact-based decision-making capabilities. A closer look at the segments within the U.S. Insights & Analytics market reveals that 2021 growth was not distributed evenly across the various disciplines that comprise this broad view of the market.

The segments most commonly associated with the tech-enabled sector (i.e. Digital Data Analytic, Enterprise Feedback Management, Social Listening & Communities) continue to experience the highest growth rates and are gaining share in the industry. The segments most commonly associated with 'Traditional Research' (i.e. Established Marketing Research, the largest sector of the industry, and Industry Reports & Research) are showing steady growth this year but continue to lose share to the faster-growing tech-enabled sectors of the industry.

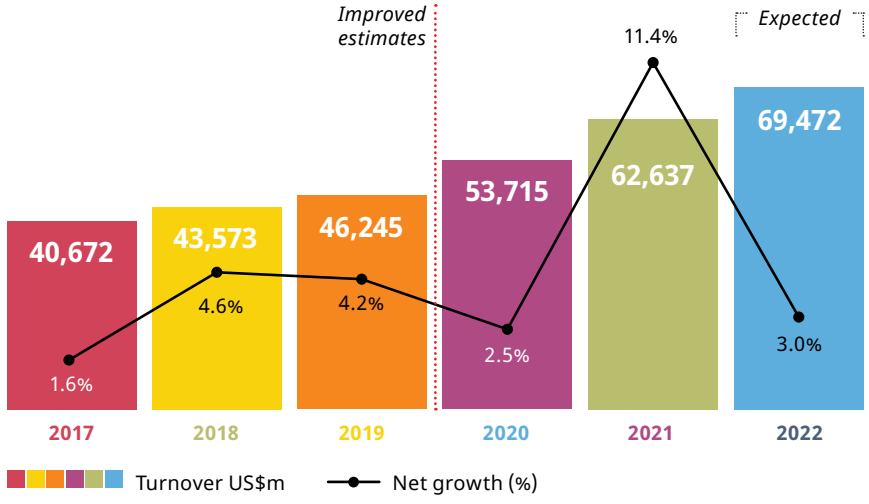
The disparity in growth rates among segments may also be driving some interesting trends globally. For instance, in the U.S., the tech-enabled segments represent a larger share of the overall Insights & Analytics market when compared to the relative segment sizes globally. This may be contributing to the higher 2021 growth rate of the overall Insights & Analytics space (i.e. 16.6% U.S. market vs 15.3% globally). This may also be contributing to an increase in the U.S. market share of the global Insights & Analytics space.

And Insights Association members appear to have enjoyed a substantially greater rate of growth in 2021 when compared to the industry at large. As previously indicated, the Established

Marketing Research segment experienced a U.S. Market growth rate of 6.5% when comparing 2021 vs 2020. Yet the same calculation yields an aggregate growth rate of 15.0% among Insights Association members classified as aligned to that segment and for whom we have both 2021 and 2020 revenue data. This reinforces a similar pattern of Insights Association members outperforming the market in previous years' data.

For the full report and analysis of the U.S. marketplace and rankings of top revenue Insights & Analytics organisations, please see this year's Insights & Analytics Marketplace and Top 50 Report, published by the Insights Association, with authorship by Michael Brereton of Michigan State University in partnership with ESOMAR and Outsell, Inc. and contributions by Simon Chadwick, founder of Cambiar.

Turnover and net growth United States



See chapter 9, table 9.2.2, for country data.
Exchange rate fluctuations eliminated. IMF inflation rates used to determine growth.

Canada

Text facilitated by: John Tabone, Chief Executive Officer, Canadian Research Insights Council

Data for Canada kindly provided by: Canadian Insights Research Council (CRIC)

Canadian Market Research Industry Experiences Strong Growth in 2021 - forecasts continued growth in 2022.

The Canadian Research Insights Council (CRIC), the voice of Canada's research, analytics and insights industry, estimates the Canadian industry generated CAD 953 million in revenue in 2021, an increase of 18% from 2020. Industry growth outpaced real GPD, which grew by 4.8% in 2021 according to Statistic Canada.

The strong growth is consistent with the prediction (17%) from last year's survey and demonstrates the growing importance businesses place on understanding the needs of their customers in a rapidly changing post-pandemic environment. It also demonstrates the ability of the Canadian industry to adapt its offerings to meet demands despite some of the challenges that the pandemic continued to pose in 2021.

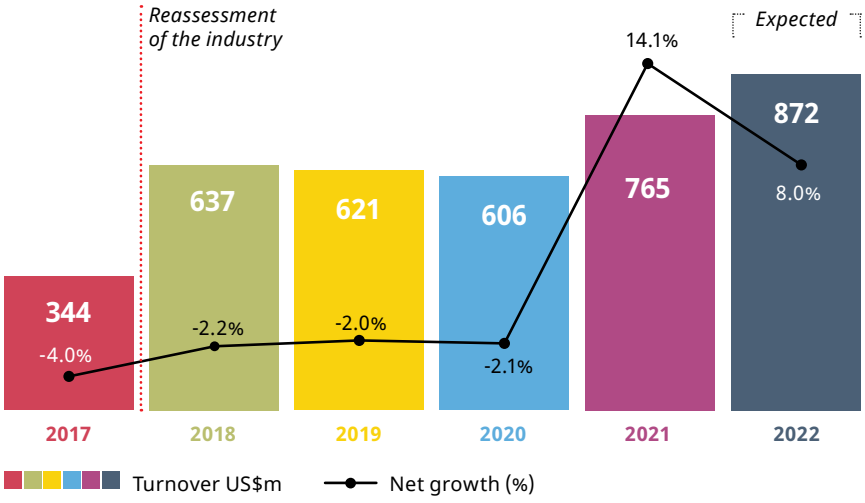
At 66%, quantitative research continued to account for the majority of the Canadian industry's revenues, with qualitative accounting for 10% and consulting, desk research, reporting and analytics making up the remainder.

- Most quantitative research was conducted online in 2021, with phone and audience measurement accounting for the bulk of the remainder.
- Qualitative research also remained mostly online in 2021 as ongoing pandemic restrictions made it difficult to plan and hold face-to-face research. With most pandemic restrictions lifted in 2022, face-to-face research is anticipated to grow in 2022.

The Canadian industry anticipates the demand for insights to remain high in 2022. The demand for insights in Canada remains subject to ongoing pandemic risks, especially the continued supply chain issues resulting from lockdowns in China. There is also a risk that interest rate increases by Canada's central bank to address record high inflation may slow demand for some products and services that rely on insights.

Despite these risks, revenues are forecasted to grow by 8% in 2022. Consistent with revenue projects, staffing, which currently accounts for over 8,000 employees, is anticipated to grow by 10% in 2022 to meet the increasing demand. Similar to 2021, industry growth is anticipated to remain well above real GDP growth, which the OECD projects will be 3.8% for Canada in 2022.

Turnover and net growth Canada



See chapter 9, table 9.2.2, for country data.
Exchange rate fluctuations eliminated. IMF inflation rates used to determine growth.

1.2.3 Asia Pacific

The diversity of the Asian Pacific region becomes most apparent when comparing the different behaviour of each of the countries. The double-digit growth rates of some of the largest and/or most developed nations such as India, Australia, Singapore, Indonesia, and the Philippines contrast sharply with the negative growth of those countries affected by either political, social or economic instability like Taiwan, Myanmar, Bangladesh or Laos.

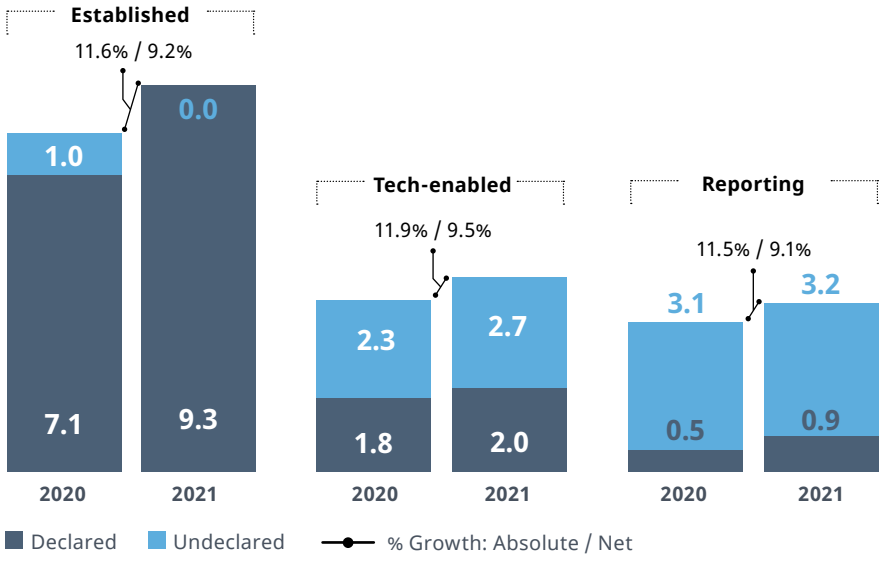
In overall, the turnover declared by the countries in this region (US$ 12,315 million) implied a net growth of +8.8%. Independent estimations made by ESOMAR's data provider Outsell suggest an "undeclared" portion of almost US$ 6 billion – please see Chapter 9, table 9.1.5 – and total net growth of +10.1%.

Unlike in Europe and the United States, where the tech-enabled part of the industry led the region's growth, in Asia Pacific, each of the three sectors of the industry grew rather in parallel at around 9% (a significant portion of "other" research results in a slightly higher overall growth rate for the region). This hints at the existence of regional differences with pockets where the most established side of the industry performs remarkably well compared to other countries where the tech-enabled industry takes the lead, and others with a thriving reporting one. It is important to emphasise the heterogeneity that exists within the members of this world region.

The industry is expected to remain strong in 2022, particularly as inflation remains moderate in most countries – only 3.4%

Estimated levels of activity, Asia Pacific

Turnover figures in US$ billion



See global and regional turnover estimates in Chapter 9, table 9.1.5

compared to the global 7.0%. The year may well end with a regional turnover above US$ 20 billion and the strongest net growth globally at +10.4%. As always, reality will certainly remain markedly different for each country as they struggle with their individual issues.

Interestingly, those countries capable of including tech-enabled companies in their estimates present a similar growth rate than the industry at a global level. Countries like India and Australia, which recently reassessed their industry (the former last year, the latter in this one), declared growth rates above +11%. The next pages offer a closer look at both countries by their respective local associations, as well as the largest market in the region, China.

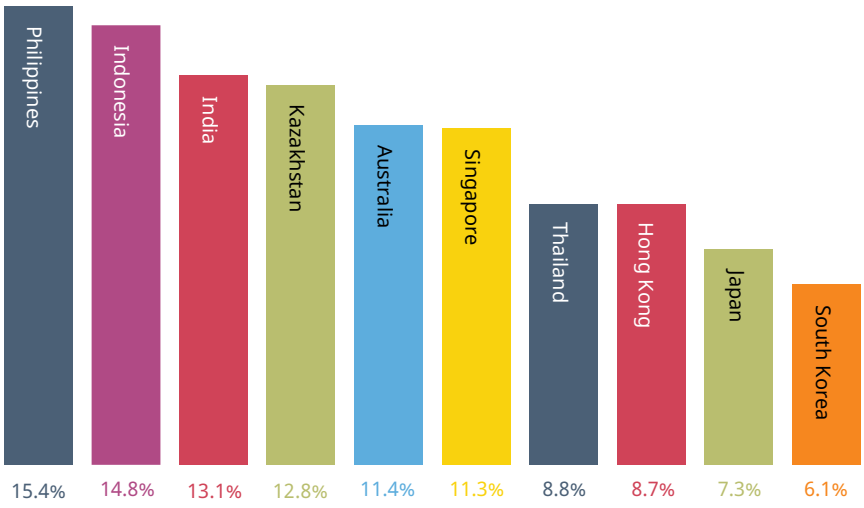
In fact, China is the only country in the region that expects a deceleration in output in 2022 amid weak economic performance and the trenchant impact of the pandemic. Net growth for this year is expected to be -5%.

This year's report is also proud to announce the inclusion of a new region, the South Pacific, which manages to posit +8.6% in net growth over 2021. Expectations for 2022, however, are less rosy at +0.9%. We will continue to track the development of these Pacific island nations over time.

While most countries have returned to pre-pandemic levels of turnover, there are still 9 markets expected to take longer than 2022 to recover. Provided no new shocks appear on the horizon that may destabilise the industry further, 2023 may be the year when Thailand, Hong Kong, Malaysia, Taiwan, Bangladesh, Cambodia, Myanmar, Sri Lanka, and Laos officially recover from the worst effects of the pandemic. The turnover left untapped in the past two years, however, may well haunt the industry for longer.

Top 10 Fastest growing markets in Asia Pacific

Net growth rates in 2021 (%)



See chapter 9, table 9.2.3 for country data. Exchange rate fluctuations eliminated. IMF inflation rates used to determine growth. Only countries that participated in ESOMAR's Global Survey, and with a turnover above US$ 10 million"

China

Text facilitated by: Mr Chi Zhang, Vice President of CMRA and his team

Data for China kindly provided by: Chinese Market Research Association (CMRA)

According to research data from the CMRA, the local turnover of the Chinese data and insights industry in 2021 was RMB 21.58 billion, recording a 6.7% increase from that of 2020. It should be noted that, based on the historical statistical standard, this result mainly focuses on the established research fields introduced by ESOMAR. Currently, the technology-enabled business has been developing rapidly in China, and many players outside the research industry have come to play a leading role in this field. However, at present, this factor has not yet entered the annual statistical scope of the CMRA.

The growth of the Chinese data and insights industry in 2021 benefitted from the huge scale of the Chinese economy and its continuous growth during the year. Firstly, the growth rate of the data and insights industry in 2021 was below average when compared with the GDP growth rate (8.1%, issued by the National Bureau of Statistics of China). This is because the biggest engine of the Chinese economy is the real estate and infrastructure industry, which maintains a low correlation with the Chinese consumer data and insights industry. Secondly, the growing domestic consumer market and the emerging younger generations of consumers have effectively been supporting the explosive growth of new consumer brands and innovative products, such as new energy vehicles, intelligent hardware, etc.

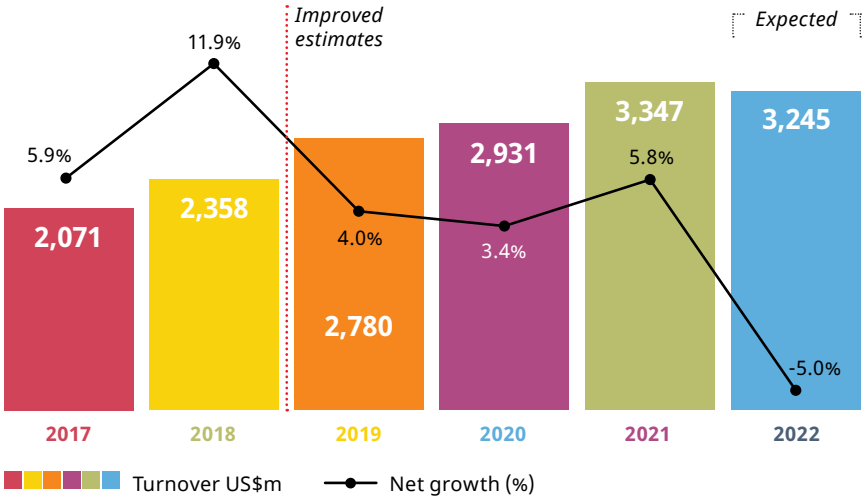
From the consumer perspective, the major client group for the Chinese data and insights industry remained the B2C industries, including FMCG, auto, home appliances, pharmaceutical, and new technology. The change that emerged in recent years is that local Chinese consumer brands have not only risen in the market share of their market sectors but also have increasingly dominated the procurement of research services. At the same time, with the increasing awareness about the role of third-party assessments in governance optimisation, the influence of the Chinese government sector as the buyer of data and insights services has increased continuously.

At this stage, the advantages of the Chinese data and insights industry are, first of all, the growing demand for data and insights services from the commercial and government sector-secondly, the continuous consolidation of local talents and big data applications. Thirdly, the growing industrial opportunities from the rapidly increasing technology-enabled data and insights businesses. Finally, the restorative industrial growth brought by pandemic relief and the continuously growing demand from the Chinese government. However, the

disadvantage of the Chinese research industry is that the majority of the industrial insiders are still heavily reliant on established methodologies, and digital transformation has become a big challenge for them. On the other hand, the current main threat is the great uncertainty about the fast-changing pandemic situation, which would have a significant impact on the Chinese research industry in 2022.

Due to the negative impact of the pandemic and the significant slowdown of the Chinese economy, CMRA predicts that the Chinese research industrial growth rate for 2022 will be -5%.

Turnover and net growth China



See chapter 9, table 9.2.3, for country data. Exchange rate fluctuations eliminated. IMF inflation rates used to determine growth.

India

Text facilitated by: Manish Makhijani, President MRSI, and Prashant Kolleri, Secretary MRSI

Data for India kindly provided by: Market Research Society of India (MRSI)

MRSI pioneered a comprehensive report detailing market sizing and segmentation, emerging market trends, segments, and major players of the Indian Research & Insights Industry. The baseline in 2021 set up an ongoing barometer of the status and growth of the industry https://insight.mrsi.co.in/indian-industry-report. This year, our research partner ValueNotes conducted expert interviews, and primary and secondary research to arrive at key data updates for 2022.

The Indian economy has seen a rebound with GDP growth of 8.7% for FY 2021-22, taking the economy above its pre-pandemic level.

The Indian Research & Insights industry too sees an impressive 19.3% absolute growth, exceeding last year's forecast. Now at US$ 2.7bn, the industry continues to be largely export-driven with more than three-fourths of its revenue coming from international clients.

The service lines within the industry saw robust growth - Analytics as a business showed a growth trend of 21% over the previous year, and Custom MR services and Syndicated/Publishing research both grew by 17%.

Analytics is likely to remain a significant play for the Indian Research & Insights Industry and is close to two-thirds of the international work done in India, leveraging the domain expertise of companies and the large Indian talent pool.

For domestic clients, however, Custom MR and Syndicated/Publishing research jointly contribute to nearly 80% of the revenue. Analytics within the domestic market is generally limited to specific domains like CX, Retail and Media analytics done by specialised agencies. However, Analytics is growing for domestic clients as multi-national companies' insights teams scale up in-house capabilities for advanced analytics.

Industry future-proofing

The pandemic triggered a huge transformation within the Indian

Research & Insights industry: adoption of digital and tech, the emergence of new players in passive data collection, setting up of self-serve (DIY) research platforms, more standardisation of offerings to enable speed, scale, and big data insights generation.

This evolution will continue to pick up speed in the near term as demand for integrated insights, speed over perfection, the role of secondary research, and understanding of micro markets for targeted actionability grow, all while businesses navigate economic uncertainty, climate change and hyperinflation in several markets.

This transformation is also crucial for future talent management and upskilling. The great resignation tide seems to have slowed down in India; however, attrition challenges remain with all industry segments tapping into the same pool of experienced resources.

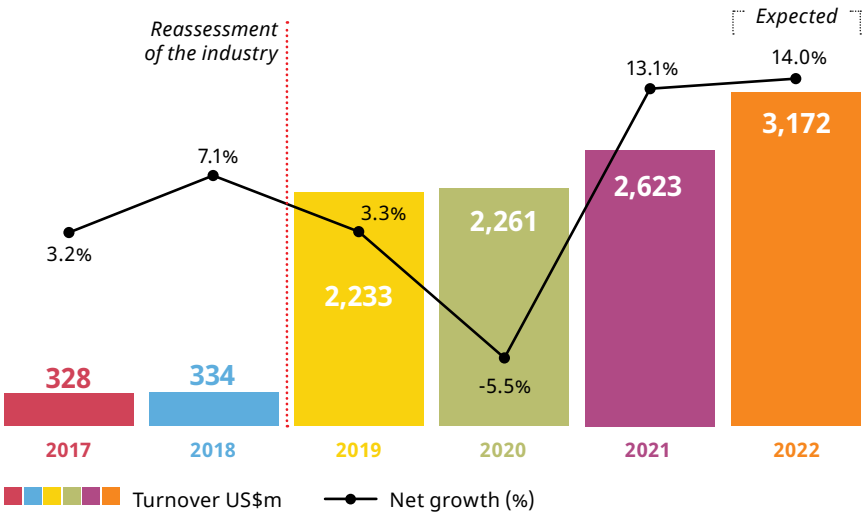
Outlook

Growth of the digital ecosystem fuels the attractiveness of offshoring of Research & Insights work out of India. The increase in suppliers to the industry through the corporatisation of innovative start-ups and family-owned businesses, along with the adoption of ESG pillars in businesses, is likely to maintain the size and growth of the Indian Research & Insights industry.

Inflation in western markets, coupled with the great resignation, could mean that cost-arbitrage gains importance for international buyers of Research & Insights; this could provide tailwinds for the attractiveness of Indian suppliers to the international market.

The outlook for the Indian Research & Insight industry is especially positive for domestic demand, with India's GDP growth forecast at 7.2% for 2022-23, and also Indian corporates' plan to leverage demand in lower-tier urban and rural markets.

Turnover and net growth India



See chapter 9, table 9.2.3, for country data.
Exchange rate fluctuations eliminated. IMF inflation rates used to determine growth.

Australia

Text facilitated by: George Zdanowicz, President, Australian Data and Insights Association (ADIA)

Data for Australia kindly provided by: Australian Data and Insights Association (ADIA)

Revision of Australian market size estimate

The Research, Data and Insights market estimate in Australia has been revised for 2021. This revision is based on analysis to produce a broader industry definition.

The revised definition also better aligns with the changing nature of the Australian Data and Insights Association (ADIA) membership and is more inclusive of organisations engaged in data provision and analytics. Previous estimates had been based on a bottom-up analysis of the established market and social research industry participants. The new approach takes a more holistic view of the industry cross-referenced against the Australian Bureau of Statistics (ABS) and industry analyst data forming the basis of the new estimate.

Additionally, ADIA considered the Australian and New Zealand Standard Industrial Classifications (ANZSIC) and aligned the industry definition with ANZSIC classification 6950 Market Research and Statistical Services in Australia. The ABS estimates that there are approximately 2,700 enterprises in Australia operating in this industry.

Strong growth in 2021, following the COVID-impacted 2020

Whilst 2021 was characterised by ongoing impacts of COVID-19 on market activity, the industry recorded growth in revenue of 14.6% in absolute terms, or 11.4% adjusted for inflation for 2021, compared with 2020 (noting that 2020 had seen a decline of -8.2% adjusted for inflation, compared with 2019).

This growth rate is somewhat consistent with the forecast provided in ESOMAR's Global Market Research report for 2020.

Key strengths in the local market include a rebound of research spending in 2021 following the COVID-19 impact on 2020. June quarter growth, in particular, was strong in 2021 vs the COVID-lockdown impacted 2020.

This strong revenue growth aligns with overall Australian GDP growth of over 4% for 2021 (notwithstanding a negative quarter in September aligned to COVID lockdowns in the largest population centres of NSW and Victoria).

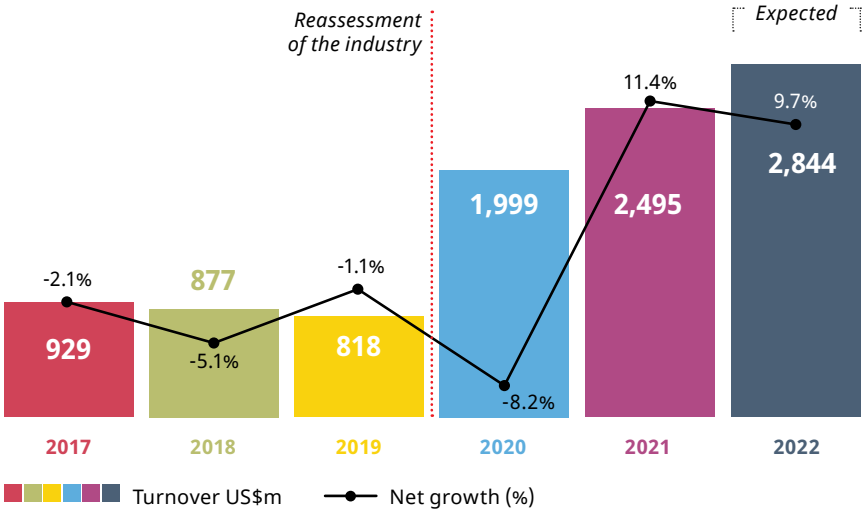
Outlook: Optimism, challenged by broader economic conditions

The Australian Research, Data and Insights market is highly fragmented, with the majority of agencies being small businesses employing less than 20 employees.

The outlook for the Australian Industry is positive but expected to be significantly impacted by global and national economic conditions. An expected 2022 growth rate of 9.7% was forecast by survey participants in ESOMAR's recent Global Market Research study.

Industry profitability is expected to continue to be confronted by factors including challenges in recruiting and retaining skilled workers in an environment of low unemployment. Additionally, high levels of inflation are impacting operating costs.

Turnover and net growth Australia



See chapter 9, table 9.2.3, for country data.
Exchange rate fluctuations eliminated. IMF inflation rates used to determine growth.

1.2.4 Latin America

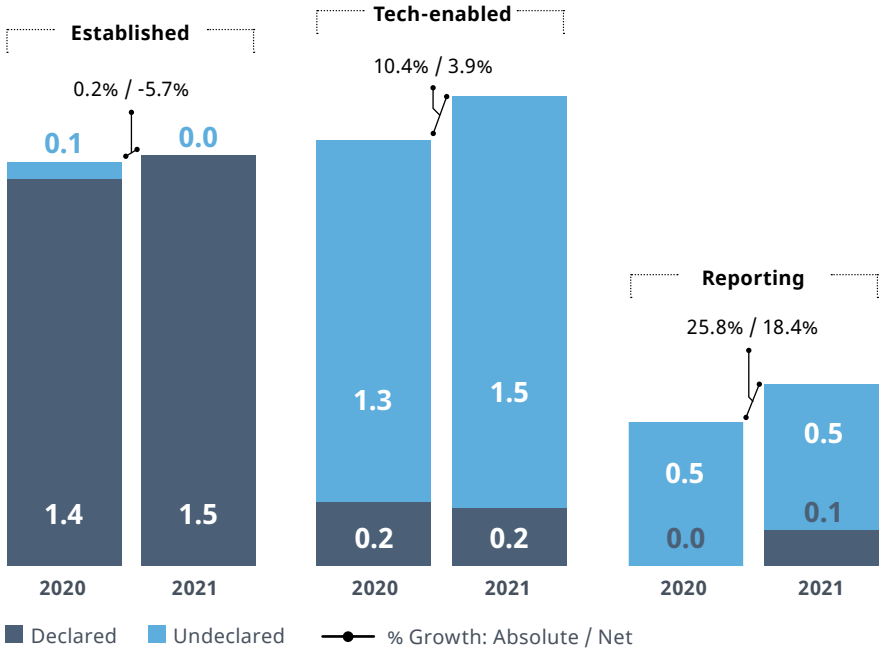
The almost +20% net growth reported by Colombia – the fastest growing and third largest insights market in Latin America – indisputably contrasts with the -6.5% one reported by Argentina, the fifth largest one. Overall, the region (plus Canada) grew an expected +4.2% over 2021 and presented an aggregated turnover in excess of US$ 4 billion.

This year's Global Market Research report also report welcomes the expansion of the data included under the Caribbean region. What until last year was an aggregated figure of five countries – Guyana, Jamaica, the Bahamas, Suriname, and Trinidad and Tobago – now unfolds to show the specific breakdowns of Jamaica along with Guyana. The growth rate for this area may look staggering, though it is worth considering the low baseline for these figures and the almost-complete halt imposed on the industry by the pandemic in previous years.

The bulk of the growth in the "Rest of the Americas" (which includes Latin America and Canada) came from the tech-enabled sector. While the reporting sector may appear to have a higher net growth rate, the truth is that the industrial area that most dollars generated was the tech-enabled one. Historically higher inflation rates in this region managed to lower growth substantially and even showed an established sector losing ground after a -5.7% growth rate.

Estimated levels of activity, Latin America (and Canada)

Turnover figures in US$ billion



See global and regional turnover estimates in Chapter 9, table 9.1.5

The present year is expected to continue the trend of stabilisation and show an industry worth over US$ 4.5 billion after a +7.5% net growth. However, we will have to wait longer before assuring with any sufficient level of confidence that the effects of the pandemic have been absorbed and overcome.

This exemplifies the unfortunate outcome severe shocks have on the different economies of the world. While the most resilient systems tend to react quicker, lose less ground, and recover faster, other ones appear more vulnerable, for longer. This widens the existing differences across countries in the world, overall weakening the global equilibrium.

No outcome reflects better the disparate recovery from the pandemic than the fact that only six markets managed to present positive net growth during 2021 – of which four were double-digit. And while in overall, no country projects negative growth for 2022, only two markets expect a net growth rate of 10% or above: Colombia with 10% and Peru with 16%.

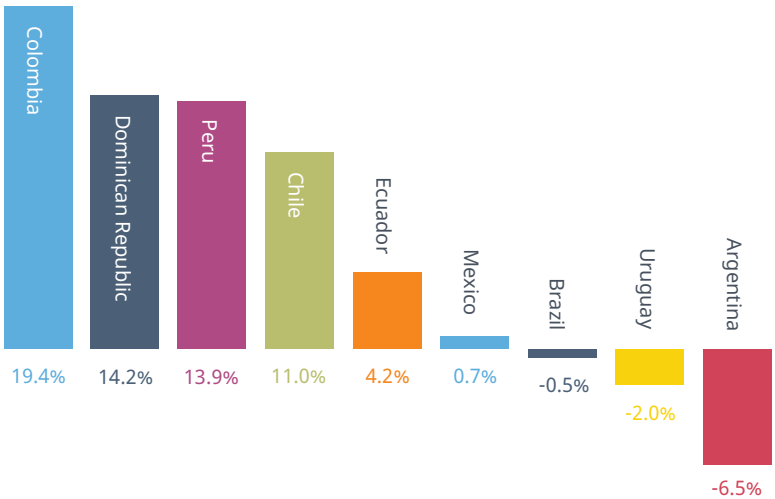
The high inflation rate that seems to have become so usual for some of the Latin American countries continues to inhibit the proper development of the industry. With an inflation rate of almost 10% expected for 2022, Latin America's growth largely finds itself engulfed by the severe effects of these price adjustments which make it a challenge to generate substantial available capital for reinvestment.

After years of health emergencies, social unrest, and bouts of political turmoil, the region seems to be finding a new path for development. Still, anxiety remains in some countries, such as Brazil, where the proximity of general elections in late 2022 became an excuse to spread confusion among the population, according to local commentators.

Countries see 2022 with cautious optimism, and, while negative growth is generally not expected, neither is it a confidently positive level that would bring countries out of the valley experienced in 2020.

Fastest growing markets in Latin America

Net growth rates in 2021 (%)



See chapter 9, table 9.2.4 for country data. Exchange rate fluctuations eliminated. IMF inflation rates used to determine growth.

Only countries that participated in ESOMAR's Global Survey, and with a turnover above US$ 10 million.

Brazil

Text facilitated by: Duilio Novaes, President of ABEP

Data for Brazil kindly provided by: Brazilian Market Research Association (ABEP)

The research industry in Brazil is experiencing a moment of insecurity and media attention. All this is caused by a wave of fake news that casts doubt on the reliability and fairness of the electoral polls, guided by the election scheduled for October this year.

As an example, significant widespread damage was caused by false surveys with strange numbers related to the candidates with the highest chances. The 2022 election will be decided between two candidates, it is extremely polarised, and the other candidates do not seem to register significant indices.

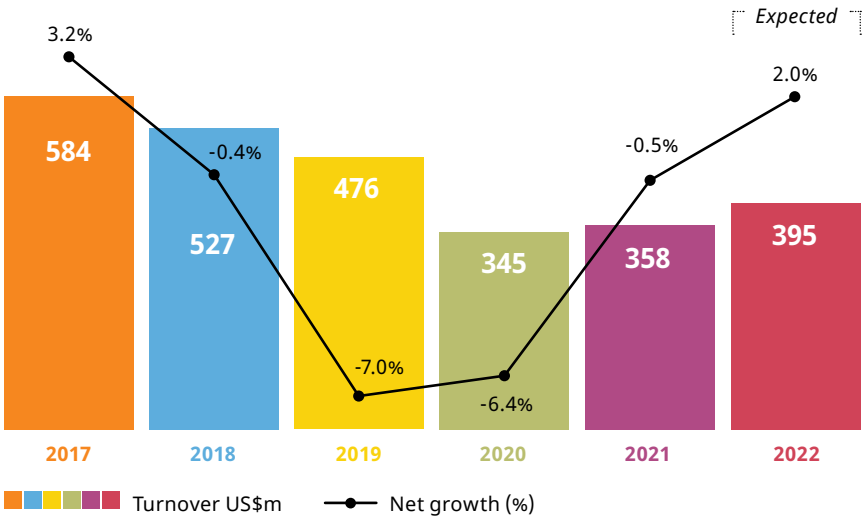
Some ABEP associates, in the figure of their executives and interviewers, are being bothered by the militancy of one or another candidate with the aim of destabilising the industry.

With a didactic and elucidative purpose, ABEP has positioned itself almost daily in the press, always in a technical way, clarifying points such as methodology, sampling, approach, the margin of error, etc. In addition to this constant presence in the media, the association organised, in May of this year, a special workshop for journalists on the criteria that guide electoral surveys. The event brought together more than 100 professionals from the press in two days of lectures and counted 150 professionals from the market research and opinion industry.

The dissemination of good information is ABEP's main instrument to combat unfounded news about the respectability and ethics of the Brazilian research industry, which is largely represented by its members.

"The research industry in Brazil is experiencing a moment of insecurity and media attention"

Turnover and net growth Brazil



See chapter 9, table 9.2.4, for country data.
Exchange rate fluctuations eliminated. IMF inflation rates used to determine growth.

Mexico

Text facilitated by: Gregorio de Villa, President of AMAI

Data for Mexico kindly provided by: Mexican Association of Market Research and Public Opinion Companies (AMAI)

(The text below corresponds exclusively to AMAI's annual study, which varies slightly from the figures published for Mexico in Chapter 9 of this report)

AMAI was founded in 1992. It is an independent group of organisations that conduct distinct phases of the data generation and transformation process for decision-making in social or business areas. It is dedicated to fostering and promoting the professionalisation of this productive chain, improving its quality, and promoting recognition of its commitment to the development of Mexico. To date, it counts sixty-eight companies among its associates.

AMAI conducts since 1998 an Annual Study of the Industry to measure the situation prevailing in the Mexican research, insight, and analytics market.

The annual market value corresponding to the 2021 study is MXN 7,523 million (roughly USD 376 million).

In this edition, there are 51 comparable companies whose combined turnover had an increase of 18.42% versus 2020 (a 21% decrease was observed in 2020 versus 2019 due to COVID). Of the comparable companies, 22% reported a decrease (versus 67% in the previous year), while 76% reported growth (versus 30% in the previous year).

According to the data from the XXIV edition study, quantitative studies represented about 71% of annual turnover.

In 2021, 8,000 research and market intelligence projects were conducted, which represented an increase of 1,000 projects compared to the previous edition.

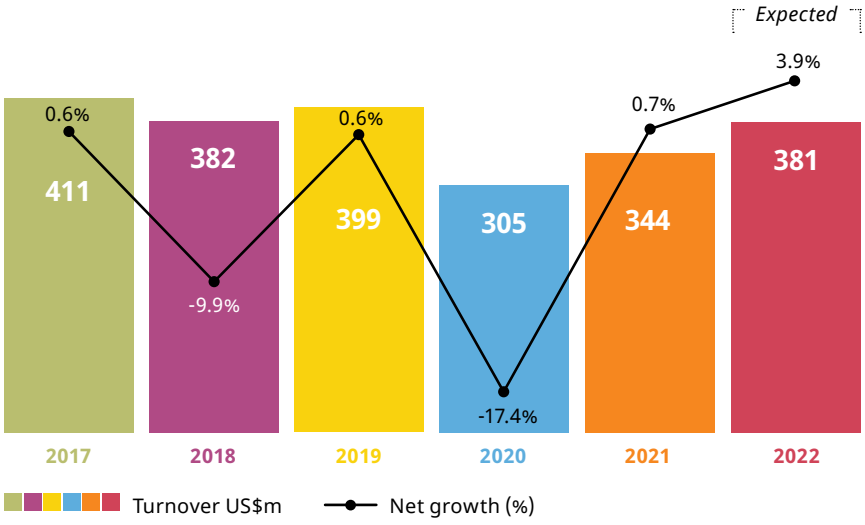
Regarding qualitative research units, 8,000 focus groups, 10,000 in-depth interviews and 2,000 ethnographic observations were conducted. And talking about quantitative research, 6 million quantitative interviews were conducted in 2021, 34.6% face-to-face, 34.2% online, and 25% by telephone.

Almost 8 thousand people were employed in the Mexican research industry during 2021, an increase of approximately 14% with respect to the last edition (well below previous years when 12 to 15 thousand were employed). Regarding gender distribution, the ratio of men and women is 1; that is, for every man, there is a woman.

In terms of short-term challenges, participants mentioned a greater use of data analysis tools such as data mining, artificial intelligence and the integration of technology in general.

Finally, regarding the outlook for 2022, 60% of participants have a positive perspective.

Turnover and net growth Mexico



See chapter 9, table 9.2.4, for country data.
Exchange rate fluctuations eliminated. IMF inflation rates used to determine growth.

Chile

Text facilitated by: Marco Antonio Tapia, Service Line Leader at Ipsos Chile and director of AIM

Data for Chile kindly provided by: the Association of Market Researchers and Consultants (AIM)

The Chilean Association AIM was legally created in 1985 as a non-profit organisation. It gathers companies, academic institutions and professionals dedicated to market and public opinion research.

AIM's main objective is to develop the market and public opinion research sector in Chile, considering ethical, economic, political, legal and administrative issues affecting the industry. Another one of its main goals is to promote good practices and continuous improvement of the companies' offer of services.

AIM has currently 22 companies, 1 academic institution and 6 professionals associated to it.

According to public figures about the size of the market (Chile SII last updated: 2020), 415 companies classify themselves within the market and public opinion research sector. This shows AIM's high potential for growth in terms of number of associates.

Market Size (AIM associates) 2021

Turnover 2021 of AIM associates is CLP 41,849.- million (US$ 44,8 million), which projected to the total Chilean industry translates to CLP 72,494 million (US$ 95.5 million). This corresponds to a 16% increase in nominal currency versus 2020. However, Chile's 4.5% inflation moderated real growth to 11%.

Quantitative research represents 61% of AIM turnover, a small increase versus the 2020's 59%. And online is the most important method in the country, with a share of 55%. Challenged by the pandemic, face-to-face research recovers from 18% in 2020 to 21% in 2021.

In relation to the scope of projects, 85% of the turnover was conducted and paid in the country, and 15% was outside of the country.

Pandemic Influence on the Use of Space

AIM also asked its associates about the usage of physical offices. 25% of the associates declared to have left their offices and begun to work only from home. More than 50% of associates reduced the usage of space and now work in a mixed system.

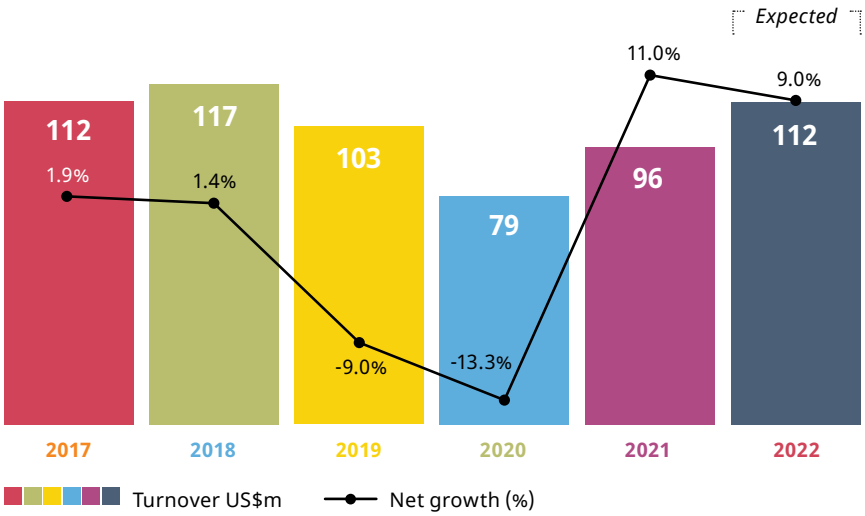
9% of employees worked in company offices in 2021, while that figure raised in 2022 to 59%, most of them working in a mixed system.

Market expectations for 2022 (AIM associates)

Even though AIM associates expect turnover to rise by 9% in 2022, high national inflation levels could moderate the real result to a level closer to 0%.

Despite the expectations of low or no growth for 2022, turnover in Q1 of 2022 showed a 37% increase versus the same period last year, as indicated by the associates. These are very good news for tackling a difficult and uncertain year not only for Chile but for the whole world.

Turnover and net growth Chile



See chapter 9, table 9.2.4, for country data.
Exchange rate fluctuations eliminated. IMF inflation rates used to determine growth.

1.2.5 Africa and the Middle East

These two regions, which saw their turnover drop over -10% in net terms during 2020, continue in their struggle to absorb the negative shock and present flat behaviour in 2021. Positive absolute growth of +5.4% turns into a negative -3.8% after factoring in inflation. As happens with some Latin American countries, a tardier recovery only adds to the differences in development that exist between these and other regions, which have already managed to successfully revert the negative impact of the pandemic. Thankfully, the net growth in 2022 is expected to bring the turnover in the regions closer to a combined US$ 5 billion.

Whether it is due to high levels of inflation or other economic, social or political factors, these regions are the only ones with countries declaring substantial drops in their industrial output. Examples are Sudan, where the staggering inflation (almost 360%) turned an absolute growth rate of over +150% to -44% in net terms, and Lebanon, where the same phenomenon managed to turn an absolute growth rate of +28% to a net one of -60.5%, or Iran where an absolute growth rate of almost +29% falls to a level of -8% in net terms.

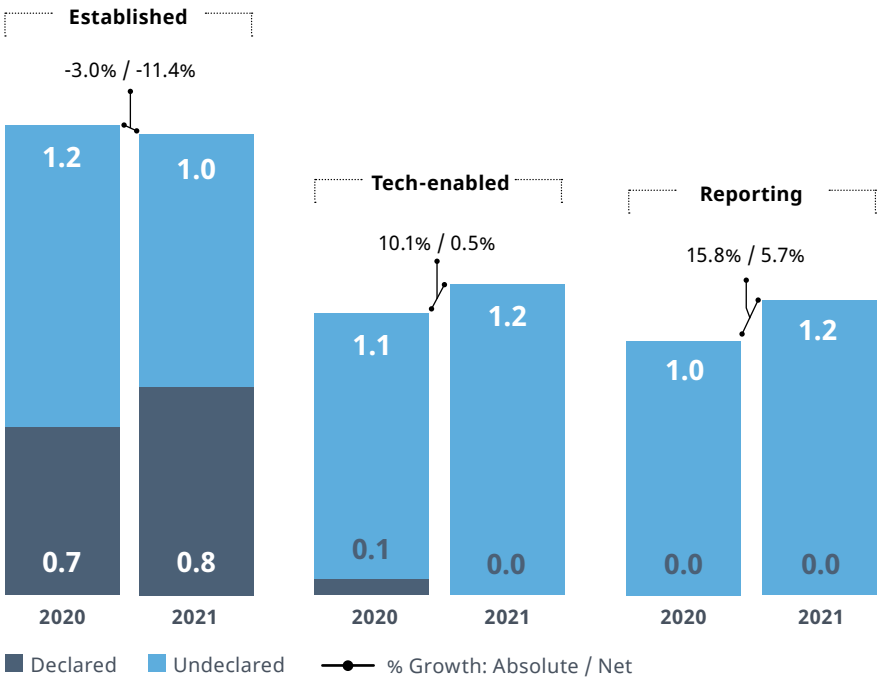
Only Egypt was declared to have reached a level of industrial output above that of 2019. The rest of the countries with available data remain at lower levels and may still require some time to pull the industry out of the pandemic pit. Recovery, however, is expected to be erratic.

The sector that managed to add the most revenue to the industry, with over US$ 160 million, was the reporting one. This absolute growth upwards of +15% hints at the emergence of a type of business where the traditional emphasis on data gathering gradually gives way to the higher added value that generally exists in the advisory, business intelligence and consulting functions.

Similarly, the strong growth seen for the tech-enabled industry – over 10% in absolute terms, though flat after inflation – appears to show the development of a new array of techniques and companies in these regions. While the bulk of this turnover remains undeclared, we hope to be able to present in upcoming editions of the Global Market Research report breakdowns in Chapter 9 that include the turnovers of all three main sectors of the industry in each country.

Admittedly, the challenges which remain for ESOMAR are the regularity in the acquisition of data and its coverage. We will continue to work to ensure the inclusion of more countries in the pages of the Global Market Research, as well as other ESOMAR reports, and would likewise like to acknowledge the work of all those collaborators who take the time each year to help us compile this information

Estimated levels of activity in Africa and Middle East



See global and regional turnover estimates in Chapter 9, table 9.1.5

Nigeria

Text facilitated by: Paul Nnanwobu

Data for Nigeria kindly provided by: Nigerian Market Research Association (NIMRA)

General Economic Overview

The economic activity in Nigeria is still recovering following the impacts of the COVID-19 pandemic, insecurity and bad leadership. Even though GDP reportedly grew by 3.11% (driven by non-oil sector) in the first quarter of 2022 compared to 0.51% in Q1 of 2021, many businesses are still struggling to achieve growth. GDP growth in Q4 of 2021 was 3.98%, so there is a visible lower economic activity this year. The NGN-USD exchange rate currently hovers at around N450, though in the parallel market, it trades at NGN650-700. Inflation is currently at 18.60% (5-year all-time high) compared to 17.75% in the same period of 2021, while interest rates were raised from 13% to 14%. Nigeria, a consuming economy, also felt the impact of the war in Ukraine. Total imports from Ukraine (largely grain, cereal and steel) average USD54 million per annum, with no visible export to Ukraine. How have these activities affected Nigeria and the Insights industry?

Insights Industry report

The business contraction of the industry during the pandemic and the slow economic activity of 2021 seems to be easing out somewhat. Though there has not been a significant increase in the number of employees, what is significant is the slight realignment and priority in hiring and cross carpeting[1] within the workforce. The share of international projects the industry records stand at 80%, while quantitative studies represent 70%. Though the market contracted by 49% in 2020, the Nigerian Insights and Analytics industry is expected to grow by 3% in 2022. Total full-time staff currently hovers at around 650+ employees, with part-time and freelance staff amounting to 2100.

Technology migration from established methods is receiving a boost, and online research methods have somewhat steadied the level they gained during 2020, though they lost some ground (1-2%) as markets started recovering from the pandemic in 2021. While Nigeria is a dominantly 'face-to-face' market when it comes to data collection, agencies have discovered the time and cost-saving result of technology migration, and many are making substantial investments in this area now. Investment in online panels is also gaining momentum. The industry witnessed an increased number of projects on mobile telephony, especially coming from the Southeast Asia markets, mainly China, a trend that continues into 2022.

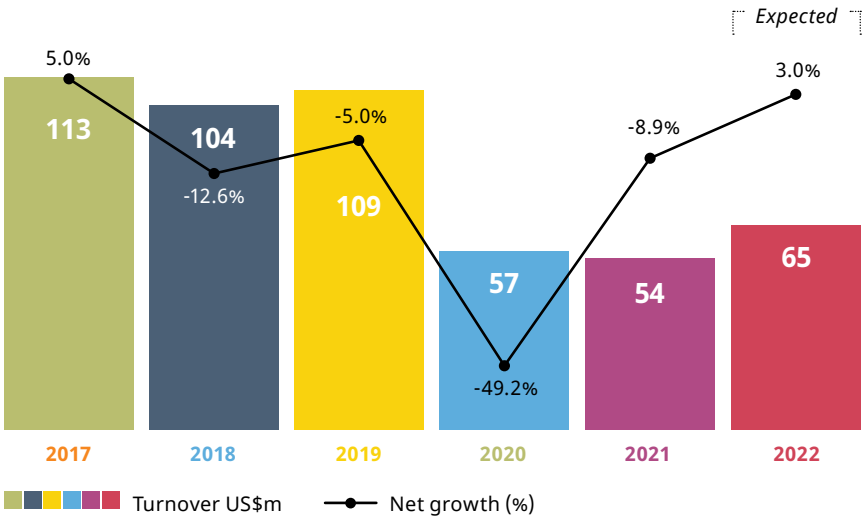
1 Colloquial term commonly used in Nigeria meaning to move from one political party to another in the hope of securing a better position or greater personal wealth, here applied to the workforce.

Subcontracting outside of the domestic market ebbed downwards to 10% compared to 15% before the pandemic. Nielsen, Kantar and Ipsos still maintain the dominant key players' positions. Many of the locally owned agencies are gaining ground to stabilise their respective hold of the remaining market share left after the harrowing days of the pandemic and the recession. Marketing budgets are being cut by many clients in favour of self-serve (DIY) research. Slow internet/broadband speed systemically persists though little progress has been recorded.

The year ahead

The industry in Nigeria expects to see an increase in the use of tech-enabled methodologies, which will reduce cost and project turnaround time. Industry practitioners are prioritizing capacity building among its workforce and has started making some in-roads in areas of building synergy and cooperation, and collaboration to enhance expertise among themselves. It is expected that the economic paradigm will shift positively and dramatically after the February 2023 general election if the opposition – the Labour party – wins the presidential elections.

Turnover and net growth Nigeria



See chapter 9, table 9.2.5, for country data.
Exchange rate fluctuations eliminated. IMF inflation rates used to determine growth.

Tunisia

BEMSO

Text facilitated by: Nébil Belaam

Data for Tunisia kindly provided by: Association of Market Research Institutes and Opinion Polls (BEMSO)

Tunisia is a country in northern Africa on the southern coast of the Mediterranean Sea.

With an open economy, the country has strong relations with Europe and Western countries, though its economic situation is mixed. Tunisia is, in fact, the only country of the "Arab Spring" to have succeeded in managing its political transition, thus sending a strong signal to the international community.

The market research industry is characterised by a service offering that meets international standards despite the narrowness of the market.

In 2013, and following the initiative of local institutes, the first association of Market Research Institutes and Opinion Polls in Arab countries was formed: BEMSO.

The first mission of this association is to set up a legal and institutional framework for this activity that meets ESOMAR standards.

Today, BEMSO was able to finalise its legal framework project relating to public polls and which have a direct link with elections and referendums.

During the last couple of years, the market research and opinion polling sectors have not been perfectly impacted by a double crisis: political crisis (during a whole decade) and the health crisis of COVID-19. This was due to the following reasons: a new type of demand for research, especially at the international level, which concerned the field of health and COVID-19 in particular with the needs on the expectations towards vaccination, evaluation of the vaccination campaign, impact of the confinement, and repercussion on the economy in general.

Moreover, and in particular, in the field of opinion and politics, Tunisia remains a very open and free country to study all questions concerning opinions, attitudes, choices, motivations and obstacles at the level of the electorate, at the level of voting intentions, and on the evaluation of the Government's or even the Head of State's work. There have never been any restrictions or barriers to conducting these types of studies except during the period of the pre-election polling ban, which is still an excessively long period compared to world practices (2 and a half months).

The year 2022 is already showing positive developments in insights when compared to previous years. Tunisia, a small country, has the particularity of conducting all kinds of research studies and diversifying the modes of data collection compared to other countries of the Maghreb, thanks to Tunisia's low illiteracy rate. It is the country in the region where the connection to the internet and the use of social media is

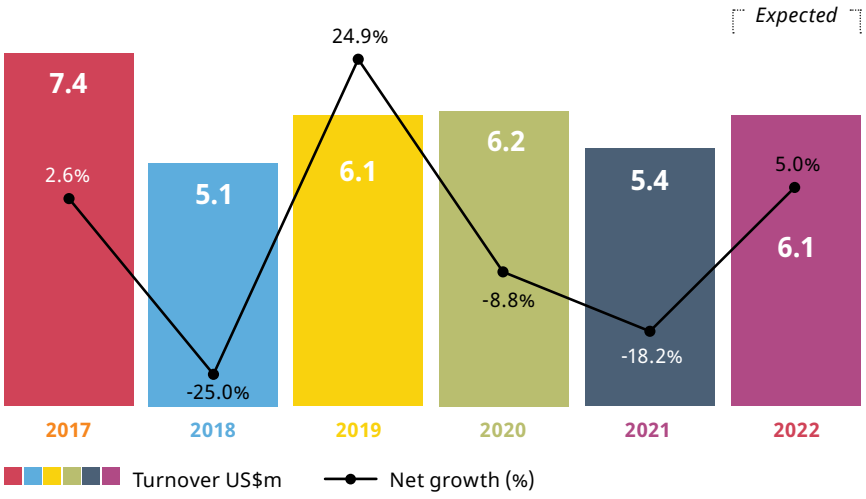
the highest. Hence the emergence, although a little slow, of online methodologies and the use of new approaches to data analysis such as BI and Big Data analysis.

However, the country is currently going through a very particular constitutional crisis, which makes for a somewhat unclear future in the short term.

Assuming that this crisis is surpassed, we can expect progress in the economy and a great expansion of the Tunisian market abroad. The industry will likely experience very substantial growth, potentially doubling the industry´s turnover within 5 years.

This opening to the world market will be accompanied by a revival of confidence in the business climate and therefore by the return of foreign investors and economic operators who have massively left Tunisia during the last decade.

Turnover and net growth Tunesia



See chapter 9, table 9.2.5, for country data.
Exchange rate fluctuations eliminated. IMF inflation rates used to determine growth.

2. Global trends

by Xabier Palacio

2.1 Five largest markets

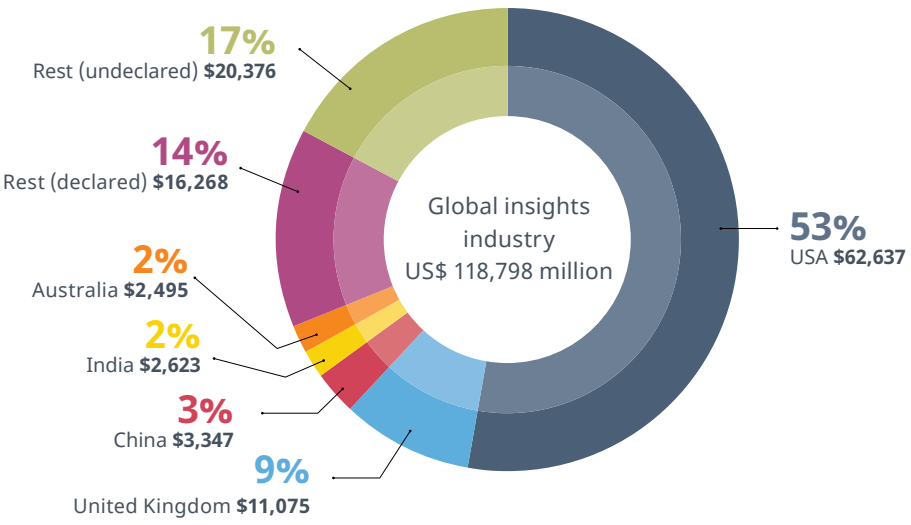
The main question after seeing the K-shaped recovery of the industry in the different countries is how the global market share of the five largest markets has changed over time. As Chapter 1 cautioned, a possible outcome of a large disparity in the recovery rate of countries is the widening of their development gap. Publication of ESOMAR's Insights Market Development Index, expected by November, will help identify the areas for improvement in the world's countries.

Over the years, ESOMAR has improved its estimation tools to identify the sectors of the industry covered by the world's countries in their measurements. While all of the world's countries include established companies in their estimates, only around a third extend the surveying efforts to the technology-enabled ones, and around a fifth do the same to reporting ones.

An assessment of the five largest markets, therefore, necessarily needs to be split into different sections: the main countries within the established sector, the ones within the technology-enabled sector and, lastly, those within the reporting sector.

However, at a global level, the five largest countries for research are the US with a global share of 53%, the UK with 9%, China with 3%, India with 2%, and newcomer Australia with 2% after a full reassessment of their industry. The rest of the declared turnover from the world's countries amounts to 14% of the total, while the undeclared portion of turnover is estimated to represent 17% of the total.

Five largest markets - Total insights industry



2.1.1 Five largest markets – Established sector

This year's established sector is estimated at US$ 46,161 million globally and grew an estimated 5.0% in net terms over 2021. Please turn to Chapter 9, table 9.1.5, for a regional breakdown of this figure. This turnover level compares to US$ 41,689 million in 2020, which is itself an adjustment from the estimate published in last year's Global Market Research report.

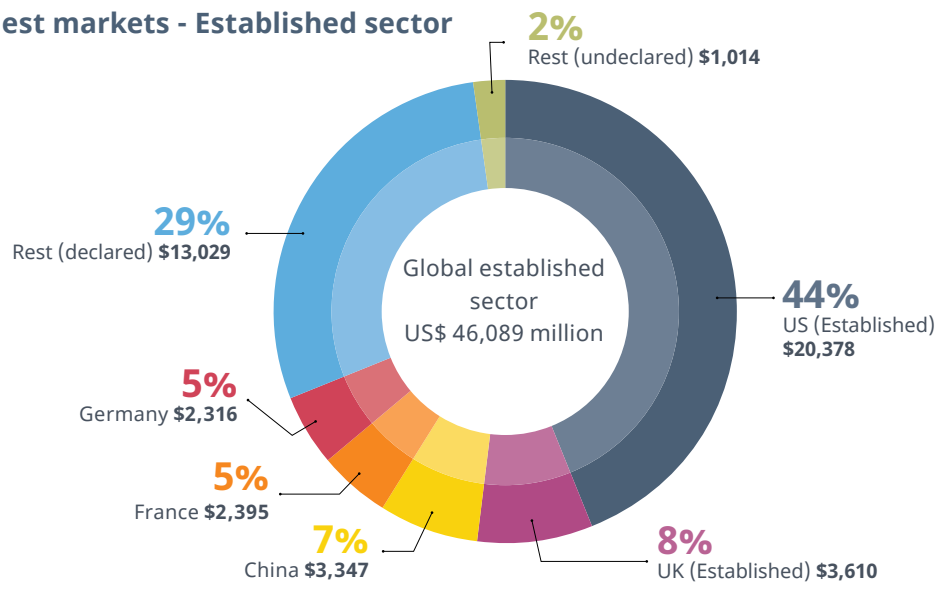
This difference stems from an improvement in ESOMAR's data collection efforts. This year, countries were directly asked which sectors they included in their estimates rather than extrapolating it from the available data on methodologies used in the country, shown in Chapter 9, table 9.3.3. Since some countries did not have sufficient information to fill in the data in table 9.3.3, their turnover would be missing in the global aggregation of sectors, thus creating an inaccuracy.

The US remains the largest market in the world in the established sector, with a share of 44% globally. This result shows the strength of the tech-enabled sector in this country compared to the others, which helps explain the 53% in global market share of their insights industry

The established sector within the UK remains the second largest and represents up to 8% of the global industry, closely followed by China, a country which is not (yet) covering the rest of the sectors in its national survey.

It is interesting to note, however, how almost 98% of the global established turnover is declared, with only a small fraction remaining beyond this report's direct coverage. This amount belongs to Africa and the Middle East, two regions we continue to work on adding and improving our available estimates.

Five largest markets - Established sector



2.1.2 Five largest markets – Tech-enabled sector

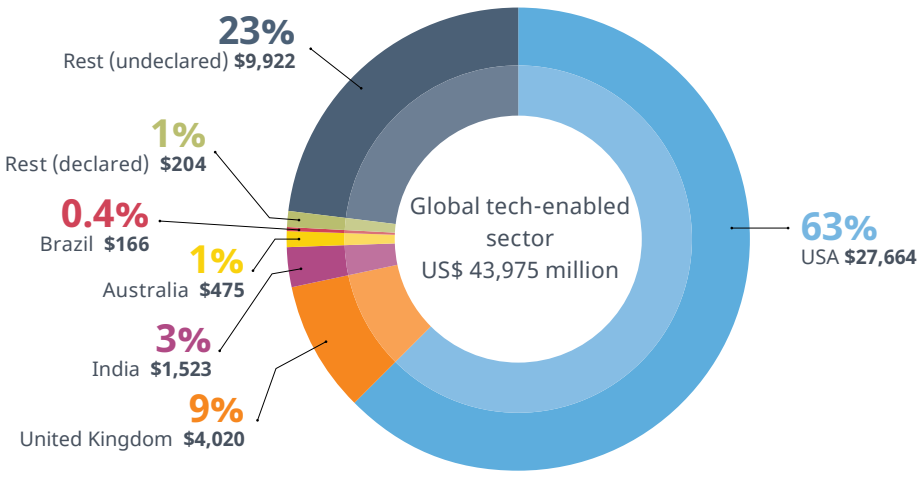
A look at the available (read, "declared") data from the tech-enabled industry shows a starkly different picture of the world. This comes to show the work left to do in improving the detail available on the tech-enabled industry. The second largest share (22%) belongs to an as-of-yet undisclosed group of countries for which no data yet exists. ESOMAR is able to identify it independently with help from its data partner Outsell.

The dominant global player is, indisputably, the US. Such concentration of market share is particularly concerning for a type of industry that excels at decentralised operations. Are we witnessing the flourishing of companies settling in, and operating from, the US? And what does that mean for the sovereignty of the local industries of the world?

The industry, and therefore ESOMAR, and the local associations, as well as the academic world, should continue to foster the creation of the necessary spaces to build up talent. Paired with a local industrial fabric aimed at enabling the birthing of increasingly technological solutions, this talent will guide the creation of independent and culturally unique firms to serve the needs of clients in their countries.

Intuition would suggest that countries that sit at the top of the global ranking could, in fact, belong to the top 5 with the largest tech-enabled sector, should they measure it. The fact that they are absent from this section is a direct sign of just how much turnover remains unaccounted for. We hope to be able to shrink the undeclared portion of this sector in years to come as countries continue to strive for more inclusive estimates of their industry.

Five largest markets - Tech-enabled sector



2.1.3 Five largest markets – Reporting sector

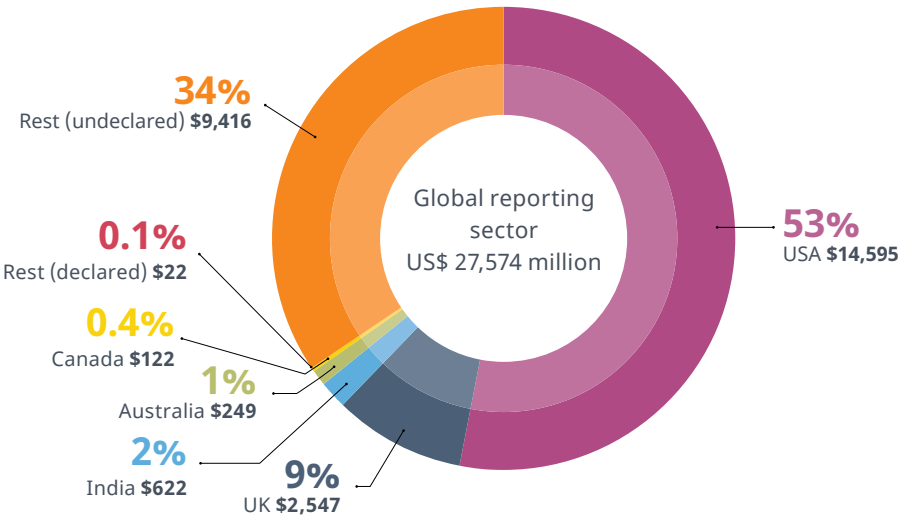
Firms specialised in consultancy, business advisory, secondary data research, and report creation form the bulk of the reporting sector. In the days when data collection used to represent the largest portion of the project's budget, this stage of the business cycle used to be integrated into the offer, oftentimes at no extra cost. This may have been a by-product of competition and cost-cutting measures in a reality where data collection did not have much margin for adjustment.

The truth, however, is that this is an essential part of the cycle where intelligence is finally shared with clients and the short-, medium- and long-term strategies of firms decided. Agencies still offering their deliverables as a slide presentation before moving on to the next project should realise that a US$ 27.6 billion global industry keeps thriving in the meantime.

The largest market remains the US, home to firms such as Gartner, CoStar Group, Deloitte, McKinsey & Co., Booz Allen Hamilton, BCG and Bain & Co., with a share of 53%. The UK takes second place, with a global share of 9%, followed by India (2%), Australia (1%) and Canada (0.4%).

Again, the excessive size of the undeclared portion of this industry speaks of a wide array of companies that remain hidden from the countries' scrutiny. ESOMAR is able to identify the global and regional portions of this turnover, and encourages countries to expand the catchment of their local surveys in order to include more specific information on the composition of this sector. This top-5 overview will surely change over the years as measurements improve.

Five largest markets - Reporting sector



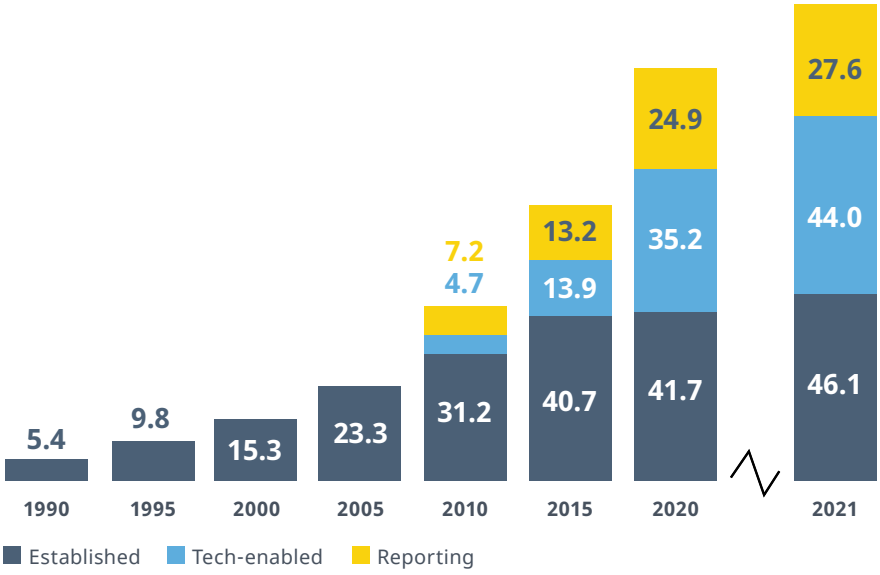
2.2 Global segmentation of the industry

Responses from the world's countries (US$ 98,445 million) provide the "declared" turnover for the industry, the backbone of the Global Market Research report. The "undeclared" portion, though, is estimated with the help of long-time ESOMAR partner Outsell (US$ 20,352 million). The combination of these sources allows us to identify a declared turnover of 83% of the total, while the remaining 17% remains unassessed.

At a global level, the established sector represents 39% of the total industry, progressively losing ground – two percentage points compared to 2020 – to a tech-enabled sector that creeps up to a current global share of 37%. The reporting sector remains relatively flat at 23% of share, giving up one point compared to last year.

How does the global Insights turnover split for each of the eight segments of the industry? What are the largest companies in each? What is the representation of each segment in the world's regions? And more importantly, what is their expected development in the next three years? These and other questions are covered in the Evolution of the Data, Analytics and Insights Industry, a forecast into 2024, along with expert interviews bringing context to the figures.

Size of the global Insights Industry



The compounded growth of the industry over the years gives credit to the massive added value it has come to provide in the last couple of decades. Today, far from having exhausted its ground for expansion, the industry presents big room for consolidation, investment continues to pour in, and new companies keep on appearing at an almost unfathomable speed.

The larger and the more diverse the industry, the more crucial the task is to encourage self-regulation. ESOMAR's central adage – also that of many of the world's associations – now rings more prescient than ever.

2.2.1. **2021, the year of research platforms**

The necessity brands had to understand the new habits developed by their customer bases during the pandemic sparked interest in developing their in-house research capabilities. And the market reacted swiftly to this heightened demand, pouring investment capital into these solutions. 2021 was a year of unprecedented levels of investment in the industry, particularly for research platforms.

The more platforms develop, the easier it will become for the segment to enter a period of economies of scale, diminished costs and higher available capital for development. While the most representative segment – self-serve platforms – has a global share of just 2.2% in monetary terms, their low-cost solutions permeate the entire industry.

(In US$ billion)	2019	2020	2021	2020/21 Growth	Total share
Established Research	**39.54**	**41.69**	**46.09**	**9.1%**	**38.8%**
(of which Sample Panel Providers)	1.48	1.64	1.92	15.3%	1.6%
Digital Data Analytics (MarTech)	19.33	21.62	26.95	23.1%	22.7%
Social Listening and Communities	8.56	9.72	12.13	23.1%	10.2%
Self-service Platforms	1.53	1.99	2.58	28.1%	2.2%
Enterprise Feedback Management	1.73	1.88	2.31	21.7%	1.9%
Total Tech-enabled Research	**31.14**	**35.20**	**43.97**	**23.7%**	**37.0%**
Industry Reports and Research	13.39	12.99	14.72	12.1%	12.4%
Consulting Firms	11.29	11.88	12.85	7.1%	10.8%
Total Reporting	**24.69**	**24.87**	**27.57**	**9.7%**	**23.2%**
Total	**95.37**	**101.93**	**118.80**	**15.2%**	**-**

Figures for previous years may have been amended in light of improved estimates.The "Established Research" estimate differs slightly from Outsell's exercise presented in the Evolution of the Data, Analytics and Insights Industry, a forecast into 2024. This is due to differences in sizing methodology. Please, turn to Chapter 9, table 9.1.5, for the expected net growth of each of the three branches. Please note that since the segment "Others" is not included here, the total may not coincide with the sum of the branches. Figures may not sum up due to rounding.

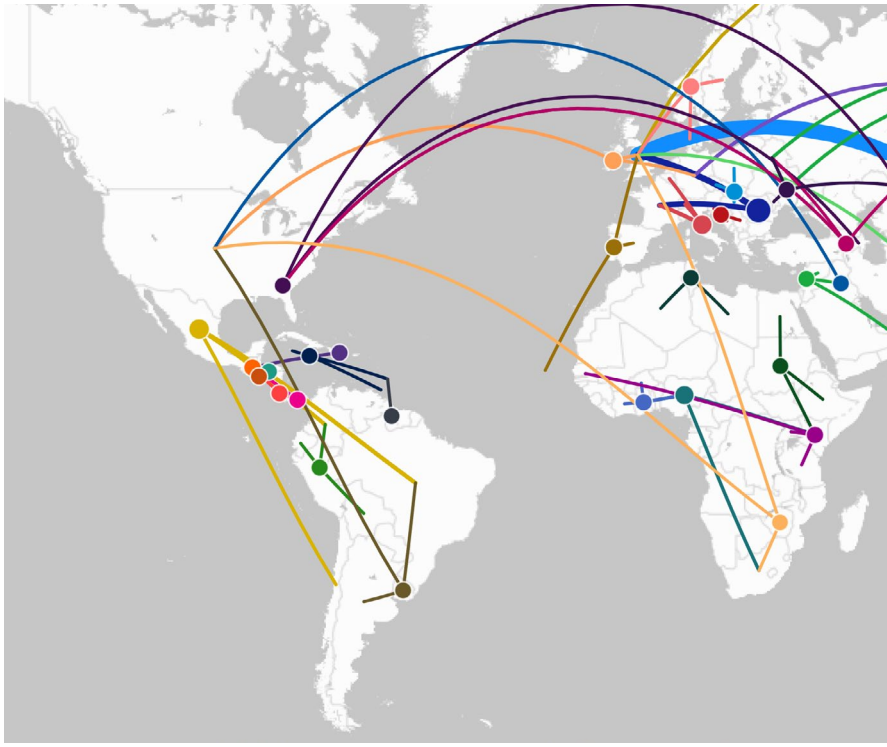
The rest of the tech-enabled sector performs similarly well, with growth rates above 20% for all segments. This excellent growth contrasts with those of the established and reporting sectors, which, in isolation, would have been remarkable in their own right. Companies like Hubspot, Qualtrics, or Lightspeed present above-average growth levels, as presented in Chapter 5, a look at ESOMAR's Global Top-50 Insights Companies.

Sample panel providers, a segment that in previous years showed very moderate growth, has reinvented itself and now constitutes an essential cogwheel in the remote research apparatus.

The industry reports and research segment also continues to grow steadily at 12% as these companies expand their business models and move increasingly beyond reporting into the realm of analysis and collection. Examples of companies which outperform their own segment growth are CoStar Group, Gartner, IHS Markit, Accenture and BCG.

For a more detailed look at the industry trends with expert interviews and their expected medium- and long-term behaviour, please consider reading ESOMAR's Evolution of the Data, Analytics and Insights Industry, a forecast into 2024.

Note: Data on Guyana, Kenya, Nigeria, Russia, Singapore, Slovakia, Ukraine and Zimbabwe is not updated from the Global Market Research 2021. Data on Ghana and Sudan is not updated since the 2020 edition.



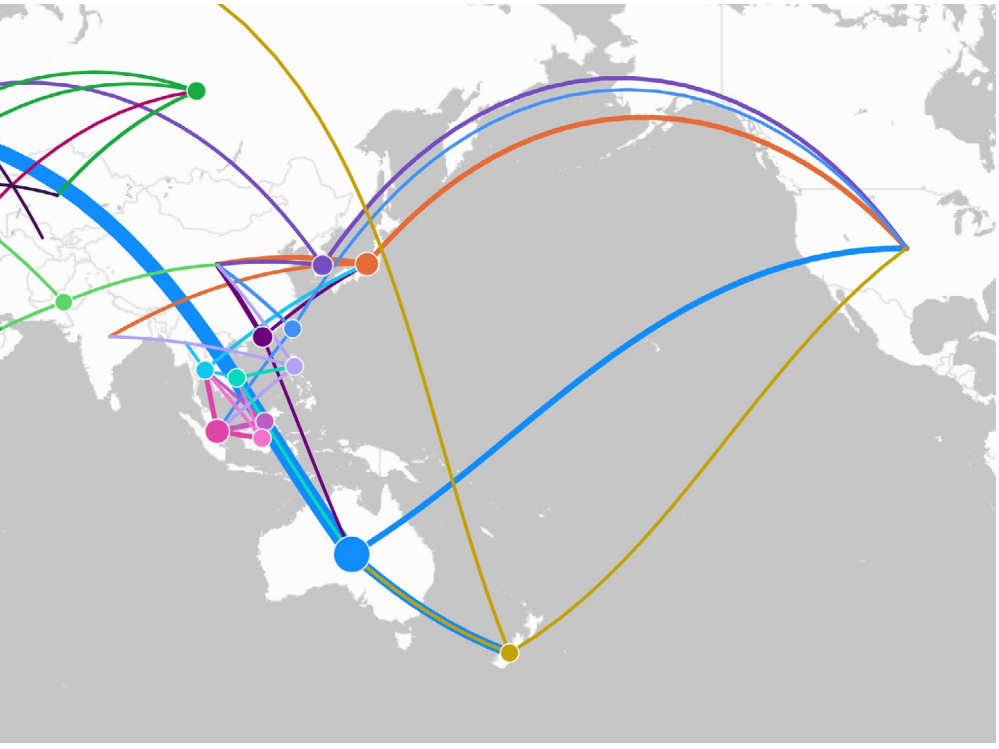
2.3 Destination of multi-country projects

The geographical distribution of international research remains essentially unchanged from 2020. The slight decrease in multi-country projects experienced during that year stabilised at 27%, while the remaining 73% remains domestic.

The map shows at a glance the substantial flows of research across countries and suggests the reasons behind some of them. Countries may either:

- share a common political background as could be with the Commonwealth of Nations
- have a common language as in Latin America
- enjoy strong cultural ties as in South-East Asia
- make use, or be, of regional hubs like Romania or Singapore
- be a natural global market, which explains the affluence of research into the US from all around the world

Please, turn to Chapter 9, table 9.3.1 and table 9.3.1.1 for a more detailed look into the flow of research. Not all countries were able to provide information for this section, and in some instances, the data could not be updated. However, the gradual refinement of this map will improve our understanding of the monetary flows of research across countries.



3. Internalising research: a problem for the established industry, an opportunity for SaaS?

by Jo Bowman

What becomes of a market research industry that's increasingly automated and in-house?

In such a fast-changing world, it's hardly surprising that the way organisations buy and use insights services is also on the move. But the huge shift towards bringing projects in-house, and using tech platforms to deploy them, is causing some hand-wringing about how much of what we call market research can be done by non-researchers. It's also raising questions about what might be left for agencies whose work has provided the foundation – and benchmarks – for good work in the insights sector.

Ray Poynter is a long-time industry observer and chief research officer at Potentiate. He has worked with ESOMAR and other partners to look at the proportion of research/insights work that's being done in-house versus what's being done by research agencies.

Doing research in-house was next to impossible pre-internet; since then, the possibilities have snowballed thanks to new and emerging platforms and service providers that enable surveys to be done, sentiment to be tracked, intentions to be monitored, and products and ads to be tested.

In 2020's research, Poynter said nearly half of all research projects were being done in-house; that had risen to more than 50% in 2021, as the total number of projects being undertaken also went up.

"The desire has been there a long time, but it wasn't possible," Poynter says.

Not only is the volume of research expanding, but so are the areas of an

Ray Poynter

Simon Chadwick

organisation that are commissioning and using it.

“It’s not as if the insights team is bringing it in-house and doing it all themselves. It’s more profound than that. The design team are doing it, the operations team are doing it.”

Simon Chadwick is managing partner of Cambiar Consulting, a change management consultancy.

He sees plenty of change in this sector and says common estimates of the volume of research/insights work being done by platforms and other tech-enabled players understate their role by a factor of three.

And that role is still growing apace – causing further disruption to the established research industry. Customer satisfaction tracking (CX) is one area that’s largely moved in-house and onto dashboards and platforms, and always-on brand tracking is moving in the same direction.

“I think there's still a lot of disruption to come,” he says.

"We saw during the pandemic [...] that models we've had of consumer behaviour don’t work anymore"

“What we saw during the pandemic was, in many companies, the realisation that models we've had of consumer behaviour don’t work anymore. And so, senior management had three questions in sequence.

The first question they threw at customer insights was, ‘what the hell is happening?’ And that meant that they had to do real-time but scrappy research to be able to provide the answer, which

Samuel Bakouch

actually fed the explosion of in-sourced, self-serve research."

The next question, Chadwick says, was, "what's going to happen?" – which needed more strategic research.

Freeing up funds for this meant putting even more of the simpler work on to platforms, and then a lot of that strategic budget went not to research agencies but to management consulting companies.

"The established research market is going to mutate into offering a lot more than just research"

"You saw a really big boost in their share of the market, to over 11% at one point." The businesses now involved in what we have traditionally defined as market research – but which don't generally call themselves market researchers – are as diverse as they are plentiful. McKinsey & Co., PwC, Bain & Company, Salesforce, Adobe and Google. There are many, many more, as ESOMAR's Global Top 50 Insights Companies for 2022 showed.

Lower barriers, broader market

One of the big players and more obvious direct rivals to established agencies is one of the driving forces behind organisations automating and in-housing their research.

Momentive is the company behind SurveyMonkey, which made it fast, easy – and crucially, relatively inexpensive – for even small organisations with no insights team to ask people questions at scale.

SurveyMonkey is now just part of a business that describes its offering as including market insights, brand insights,

> *"Self-service platforms [blew] up the idea that quality has to cost a lot and that cheaper services are, by definition, inferior"*

employee experience development and more, promising to "drive better, more confident decision-making", which sounds rather like a market research organisation's mission. Momentive says it serves 95% of Fortune 500 companies.

Samuel Bakouch, Momentive's Head of Product, says relative newcomers to the sector are sometimes rivals to the established players but often complementary service providers.

"When you have a use case that's heavily repeatable, like tracking your brand or doing a usage and attitude study, or collecting feedback on the market or from prospective customers, you're seeing technology platforms like ours really replacing a lot of what an agency would provide, with a better quality/speed/cost ratio," he says.

"When you have something like a segmentation study, there's great complementarity with what an agency would provide. We can take care of part of the data collection and analysis, and then the agency can do more customer research and optimise the segmentation based on the data provided by technology solutions."

What the self-service platforms have successfully done, Bakouch says, is blow up the idea that quality has to cost a lot and that cheaper services are, by definition, inferior. And that has lowered barriers to access to research and increased demand for the broadest definition of market research.

A platform for expansion

A bigger pie means there's more to go around, even if there are more hungry people with spoons. More on pies later.

"Research and quality insights are being really democratised," Bakouch says. "That's a really powerful trend in the industry, recently amplified by the pandemic."

Vanessa Oshima

Some of what market research agencies have traditionally provided comes not from new competitors but from client organisations themselves. Increasingly digitised businesses generate huge amounts of their own customer data, for instance. Nike doesn't need to run a survey of customers to find out how often they go running; the Nike+ app collects this kind of data directly and passively from its users.

"[Agencies must accept] that they're a piece of the puzzle and [...] work across different agencies and tech providers"

Such data streams can be a veritable goldmine of insights, but data has to be interpreted and viewed alongside so many other sources of information, not all of which is usually done in-house.

Vanessa Oshima is the former head of marketing at Starbucks Japan, ex-VP of strategy at Coca-Cola Japan, and former GM of women's sport at Nike Japan. She now heads up Heat-Data, her consultancy.

She says that the rise of automation and self-service platforms have helped research clients. Still, the proliferation of data dashboards raises some big, important questions – that more established research agencies are well placed to help organisations answer.

One is to filter data for quality in a world awash with bot content, trolls and other forms of fake or misleading information. Another is to be aware of just what the data can do – and what it can't. A limitation may be because it's historical data and so an unstable base from which to make predictions about the future, or the limitation may be because the data is only a tiny piece of a much bigger picture.

The need to see the bigger picture is leading to a shake-out of insights – what's needed, who needs it and who provides it – as everyone strives to predict what's going to happen in future and what's the best course of action to take now.

Chadwick says the wave of research tasks going to management consultancies now seems to be ebbing and established research has been making something of a comeback, but not just by doing more of what it always did.

"I think what's happening is that as things calm down, and as decision-making has reverted back to heads of insight functions, they are using their established research supplies for more of this strategic work," he says.

Many of the established players, meanwhile, are taking on a client role of sorts, using automation platforms and systems to make their own processes more efficient and effective.
"(Clients) are going to look for research agencies that have really good research fundamentals but that also are strong on strategy and that do data visualisation at a very high level," says Chadwick.

"What was the established research market is going to mutate into offering a lot more than just research."

Expansion into what?

Back to that pie. Rather than look at long-standing definitions of market research and appraise newcomers to determine whether they fall inside or outside of it (a conclusion that is largely irrelevant to the companies themselves and to the organisations that pay for their services), the market research sector has an opportunity to redefine itself. To bake a much bigger pie, if you like.

"It's possible for the pie to get bigger and for agencies to not necessarily have an absolute loss," says Poynter.

"[Look at] a constellation. Some people will just see [...] data points, [then] somebody's going to say 'that's Orion'."

From the research user's point of view, Oshima says agencies need to think less about promoting the value of their proprietary widget, tool or dashboard. Rather, they need to be generous with their time in demonstrating what it can do, as well as humble about acknowledging that there are some things that others – agencies, platforms or individuals – can do better.

"Often, they just want us to work with just one agency, but the reality is not going to work like that again, so they need to be comfortable with the fact that they're a piece of the puzzle and be able to work across different agencies and tech providers," she says.

Clients themselves don't particularly care what a provider of insights calls themselves. What they're trying to do is get the best combination of tools into their toolbox to meet their needs.

"Does it matter to the industry that we don't have those clear definitions? I don't think so," says Poynter.

"What matters is we're creating better, evidence-based decision-making and focusing on customers. I don't think it matters too much who does it and what they call themselves."

Overlapping services are not a threat to research, Chadwick insists.

"Lines are being blurred – not only the lines between data analytics and research but also between quantitative and qualitative. They are increasingly being intertwined."

Agencies should therefore look for benefits and opportunities in the tension between old and new, Oshima says.

"It's like that idea of keeping your friends close and your enemies closer.
I think that the tech people will make the 'traditional' agencies better, and that's the way they need to think about it.
The tech people don't know how consumer understanding works, and the consumer understanding people don't know how tech works.

So together, you should be able to really be fantastic."

Agencies have to overcome the sense that they alone can be a kind of "mega mind" that has all the best answers to a client's question. In reality, the most high-impact breakthroughs tend to come from a collection of insights used in combination by smart people (note: not AI-powered platforms).

Think here of iTunes, born of linking an insight into how music fans want to play the songs they love with a vision for how that can be monetised in ways that differ from album sales. This was then combined with the understanding that high-speed connectivity would allow affordable, reliable streaming. Or perhaps Tesla, whose success is the result of combined insights into consumer needs and fears, infrastructure, policy, taxation and more.

And when tools, agencies and individuals contribute to real progress, the results can provide strong evidence for further investment. So rather than fight for 100% of a small pie, why not have 25% of a pie that's ten times the size?

The value of the human factor

Momentive's Bakouch says the volume of insight work that can be generated by AI is expanding, but the machines can't do everything, nor will they.

"You will still see human involvement when you're trying to make recommendations ... and you need your executive team to make important decisions, so you'll still need to make sense of and present insights in a compelling way. That will always exist," he says.

Poynter sees strong future demand for a human contribution to insights.

"In the foreseeable future, 10-20 years, we're probably going to have a shortage

of humans who can work with these tools to understand customers better," he says.

"Rather than fight for 100% of a small pie, why not have 25% of a pie that's ten times the size?"

"It starts with understanding the business problem, and there's very little at the moment in terms of AI and platforms that help business people understand their problems better and what research is possible."

Rather than humans developing ever-better AI tools to replace themselves and effectively painting themselves into an ever-tighter corner, humans could augment their skills with the tech, supercharging themselves rather than deferring to the tools.

Chadwick sees innovation, synthesis, design and analysis as human tasks even as AI becomes more advanced.

"I think the key is that if we are dealing with many more data sources, and much more data overall, we have to learn how to synthesise those various different sources of data and the data themselves and understand the stories that are coming out of them.

"Then we've actually got to be able to consult on those stories. So the more that we have the technology, the more we have to learn those 'power skills': storytelling, consulting and influencing. It's the industry going back to its roots. Think about Gallup and people like that; they were the equivalent of McKinsey today."

Oshima puts it like this: "You can look up at the stars at a constellation. Some people will just see stars; they'll just see data points one after the other, and then somebody's going to say 'that's Orion'."

"Technology is not the instigator of innovation in this industry. It's the enabler"

Chadwick suggests those who are uneasy about the changes taking place remain focused on why it's happening – and, therefore, why it must keep happening.

"Technology is not the instigator of innovation in this industry. It's the enabler," he says.

"The innovation that is occurring is due to client needs and the shifting role of insights within client companies. People need to remember that if they really want to understand what's going on." ■


210.24
209.22
1,218.38
210.74
208.33
456.60
26.42
7,513.08
29,240.68

4. The rise of un-structured data analytics

by Robert Heeg

The rapid growth of unstructured data offers many possibilities but also new challenges. As global firms need to manage this growing abundance of information, there are an increasing number of suppliers specialised in analysing unstructured data – many of them AI-based, technology-investment startups. We asked the experts what the role of humans is in the data-obsessed future.

Managing zettabytes of knowledge

According to Gartner, unstructured data represents an estimated 80 to 90 per cent of all new enterprise data. Furthermore, it's growing three times faster than structured data. More precisely, research firm ITC predicts that the volume of unstructured data is set to grow from 33 zettabytes in 2018 to 175 zettabytes by 2025 – that is 175 billion terabytes! Not only will most data be unstructured, but the International Data Corporation (IDC) also estimates that only about 10 per cent will be stored. Even less will be analysed.

The zettabytes are dizzying indeed, especially for the organisations who are increasingly relying on this unstructured data for various reasons, from regulatory and analytic purposes to decision-making. Unstructured data will be the driving force behind analytics, machine learning, and business intelligence. Over the next few years, it will deliver many business benefits but pose challenges as well.

In a recent Venturebeat interview Krishna Subramanian, president and COO of Komprise, a data management software provider, said that enterprise IT organisations intuitively know a lot of their data is unstructured and growing in double digits, “but they don’t know exactly how much they have and how fast it’s growing.”

Unstructured data, a description

There are various descriptions of unstructured data. This type of data cannot be stored within the neat,

Hana Huntova

Michalis A. Michael

"[Unstructured data is the] type of data [that] cannot be stored within the neat, uncluttered columns of an Excel sheet."

uncluttered columns of an Excel sheet. This is why it poses challenges when attempting to search and analyse this information quickly. Unstructured data can include conversations through e-mail or text messages, but also social media posts, blogs, video, audio, call logs, reviews, customer feedback, and replies in questionnaires.

"In simple terms, unstructured data is all the information we can get to", concludes Hana Huntova, executive director at SIMAR, the Czech Association of Agencies for Market Research and Public Opinion. "And perhaps it is unstructured only because we don't know the fitting key to unlock it." She expands on her description by taking a closer look at 'text', as it is used in media sciences and cultural studies. "Text is understood, approached and analysed in two ways: on the one hand, simply as a form of communication - for example, in film, articles, files, TV programs or sheet music. On the other hand, we can look at the interaction between the text and its reader; its effect on the reader, the possible methods of understanding the text and its content, and exploring the character of the content."

Michalis A. Michael is the CEO of DMR, a pioneering tech company in CXM using artificial intelligence for unstructured data integration and analytics. He agrees that text, audio, images, and video are all part of what we call unstructured data. "Another way to think of it is to consider the opposite, which is structured data; the numbers we find in tables or graphs.

Various sources claim that more than 90 per cent of all humanity's recorded data, from the beginning of time, are unstructured. It is richer, it is qualitative, but only at scale."

Growing awareness

Whilst most organisations can manage their structured data effectively, the real challenge lies in unstructured data. After all, this is where the real context and insights can be found. Not surprisingly, 70 per cent of organisations will shift their focus from big to small and wide data by 2025, expects Gartner. However, many organisations drown in data, as it is accumulated every second by, for example, countless interactions with clients, reviews, sales, or social media comments.

Huntova believes that the rise of unstructured data analytics is important because it has similar potential to its structured counterpart. "It has many forms; it can be approached from different angles, and each of us can explore different approaches and tools. On the one hand, we can look at the various data sources and debate endlessly what is data and what isn't and whether it is structured or not. And then, when we look at which methods, tools, and approaches could be applied, the sky is the limit."

"[But] does this data offer a better, more accurate, richer and more colourful understanding of the issues at hand?"

Where it comes from

Typical human-generated unstructured data includes:

- **Text files:** Word processing, spreadsheets, presentations, emails, logs.
- **Email:** Email has some internal structure thanks to its metadata, and we sometimes refer to it as semi-structured. However, its message field is unstructured and traditional analytics tools cannot parse it.
- **Social Media**: Data from Facebook, Twitter, and LinkedIn.
- **Website:** YouTube, Instagram, photo sharing sites.
- **Mobile data:** Text messages, locations.
- **Communications:** Chat, IM, phone recordings, collaboration software.
- **Media:** MP3, digital photos, audio and video files.
- **Business applications:** MS Office documents, productivity applications.

Typical machine-generated unstructured data includes:

- **Satellite imagery:** Weather data, landforms, military movements.
- **Scientific data:** Oil and gas exploration, space exploration, seismic imagery, atmospheric data.
- **Digital surveillance:** Surveillance photos and video.
- **Sensor data:** Traffic, weather, oceanographic sensors.

(source: Datamation)

Joaquim Bretcha

However, there is one thing we should keep in mind, she urges. “We need to keep asking an important question: how can unstructured data assist our mission to better understand consumers, society, and indeed the world in general? Does this data offer a better, more accurate, richer and more colourful understanding of the issues at hand?”

She isn’t the only one pondering these issues. The awareness has been growing that there has to be some kind of data management so stakeholders have the right data available in the right place, at the right time. To get to this point, organisations first needed to be aware of the eruption of unstructured data, both internally and externally, that could be in some way relevant to them.

For some time, this trend has been monitored. In 2018 Accenture and HfS Research released their global survey ‘The Future Belongs to Intelligent Operations.’ This study showed that nearly 80 per cent of financial services organisations are experiencing an influx of unstructured data. More importantly, perhaps, is that most of the participants in this study indicated that 50 to 90 per cent of their current data is unstructured.

Technology-financial rush

Until not so long ago, it was very difficult for computers to make sense of all this unstructured data. But increasingly, enterprises are now relying on this data for their analytic, regulatory, and corporate decision-making purposes. Unstructured data is becoming increasingly valuable to enterprises, and they are upgrading their infrastructure rapidly.

Artificial intelligence (AI) has played a key role in analysing unstructured data, and a firm data and technology strategy is now part of a typical enterprise AI roadmap. But this required investment first, tells Joaquim Bretcha, Ex-Officio ESOMAR President and International Director

at Barcelona-based data collection provider Netquest. “Our industry has been immersed in the combination of technology-investment-startups that has characterised the global economy of the last decade. In this technology-financial rush, many start-ups have developed capabilities that have proven useful for the market research industry. The need to understand people's behaviour and opinions is endless. While people's life is getting more intense in the digital arena, all technologies will keep developing.”

For many organisations, a cost-effective approach to unstructured data management is to choose a third-party partner or vendor. This can help jump-start their strategy. The data management challenge has inspired an entirely new sector of software startups and will continue to do so in the coming years.

There is an increasing number of companies specialised in solving data management and data analytics issues at scale. A lot of innovation is happening here in data search, data analytics, and data intelligence. This vendor-based technology allows enterprises to benefit from tech’s best practices, experience and implementation expertise, especially in the larger language models.

"In this technology-financial rush, many start-ups have developed [useful] capabilities for the market research industry"

As most companies dedicated to analysing unstructured data are start-ups

"We people are so complex that the logic of machines cannot be let alone for a long time without being trapped in our contradictions"

or early-stage companies, the question is: which place will they occupy in the international competitive arena? Michael thinks they will play a key role. "If we consider that most data available for analytics and insights are unstructured, then it is safe to predict that they will either take over from the big analytics companies or will be acquired by them." Bretcha predicts a cycle of concentration and integration. "Those start-ups or early-stage companies capable of developing smart solutions will be attractive to larger established groups. These can either be market research agencies, consultancies, or big platforms in need of better understanding their customers."

Data gold rush

As analysing unstructured data is largely the domain of AI, one may wonder what the role is of the human in this world of automation and higher complexity in analysis. Huntova is clear about this: "A machine is a machine. It only does what the humans ask it to do." She likens the current state of affairs to a 'Klondike Gold Rush for data'. "The qualities of teams who actually find the golden nuggets are emerging. And the issues with mining are annoyingly similar to the problems of the past. Do we have the right tools? Are we asking the right questions? Do we understand enough of what the client business needs to know?"

Huntova feels that there is too much talk about AI being different, about the richness of data being overwhelming and the increased complexity of it all. "The checkerboard is still the same size, and the figures appear to have the same functions. In a more complicated data environment, it is even more important that there is somebody with a helicopter view: someone who knows enough, but perhaps not everything, about every approach and concept but who still is able to drive the team toward a conclusive result."

She underlines the need for somebody who keeps the strategy in place and

deploys skilful experts to perform their advanced explorations. The varied skills in a team and their effective cooperation are more important than ever, says Huntova. “In the past, case studies were built on one winning methodology, superseding everything else. But perhaps the future is more of a patchwork.”

"Human nuances and deep motivations must be managed bypeople with the help of the power of machines."

Bretcha agrees that the role of the human is and will be key. “Machines need to get connected with machines in order to maximise their capacities. And humans must control and lead their performance. Machines enhance and enrich people's capacities but cannot replace them. We people are so complex that the logic of machines cannot be left alone for a long time without being trapped in our contradictions. The human nuances and deep motivations must be managed by people with the help of the power of machines.”

Contradictions and paradoxes

Despite its great promise, unstructured data also has its limitations. The cost has been a major issue; according to Subramanian in Venturebeat, more than two-thirds of the cost of data is not in the storage but in its active management. He knows that for every piece of data, organisations typically keep several backup copies as well as a replication copy for ‘disaster recovery’. Subramanian calculates that if your data is growing at 30 per cent, it’s more like 90-100

per cent when all the copies of the data are factored in.

Another challenge lies in our human contradictions and paradoxes, observes Bretcha. “This can be overcome by combining the power of machines with the intelligence and creativity of people.” Michael identifies another limitation: “The accuracy of annotation in the many languages. Especially when it comes to audio, there is an option to annotate content directly or transcribe to text, and that adds another layer of inaccuracy creep.”

The problem of the unstructured data is not in the data itself, thinks Huntova. In her opinion, the successful deployment of such data is in the precise definition of the research aim and then finding a team with balanced and complex capabilities that has a somewhat eclectic mix of methods and tools at hand. She learned this through personal experience. “I once worked within a marketing team. We had so much data available to us and so much different expertise and experiences; we had data from consumer marketing, trade marketing, sales, logistics, finance and research. Once a month, we sat down with the varied set of data available to us and talked about our sales performance and forecast. We learned from the data and from each other. We learned how to interpret the data, explained our data to other team members, and backed up our claims with evidence. We challenged each other and then outlined a robust, intelligent conclusion. I believe nothing can beat this approach because it mixes data - which is always imperfect - with knowledge and the bits and pieces of information at hand. All of this combined can help make informed decisions.”

Apollo 11

Bretcha is a firm believer in the power of people and feels that technology is not neutral. “It is the reflection of people's interests, biases, priorities and mindset frameworks. We have been blinded by the combination of technology

Use cases

According to Michalis A. Michael, unstructured data has applications in multiple use cases and all industry verticals. He lists some use case examples:

- Cx measurement & management
- Social media listening and analytics
- Alternative data for trading stocks
- Market research
- Influencer marketing
- Sales lead generation
- Cyber threat detection
- General text & image analytics of big data

and money and therefore treated technology as the fundamental goal. But technology is a means and never the goal." He is convinced that technology should improve the lives of people and societies, rather than being treated as a supreme good.

"Technology developers go way faster than governmental regulation or industries' self-regulation"

Observing the current AI race, he contemplates that too few people are thinking about the consequences, let alone acting upon them. "When NASA sent its first mission to the moon, Apollo 11, all potential risks were assessed, and backup plans were prepared. This does not seem to be the case with AI. Technology developers go way faster than governmental regulation or industries' self-regulation.

This is why we, as the market research, data and insights industry, must work in self-regulating our domain, demonstrate best-in-class experiences and guarantee that people's data is properly managed to the benefit of people and their societies." ■

5. ESOMAR's Global Top-50 Insights Companies

text written by Xabier Palacio
ranking curated by Ajitha Gopalakrishnan

* This chapter is adapted from its original esomar publication as a standalone ranking in July of 2022. Please refer to esomar.org/top-50-insights-companies to read the entire piece.

The increasing complexity of our industry is a testament to the surging global interest to understand humans and the world. This need has translated quite plainly into a landscape that is exciting as well as challenging. Post the grisly pandemic, 2021 witnessed a sectorial recovery fuelled by continuous growth of technology, aggressive consolidation of players, and dazzling levels of investment.

Join us to explore the ESOMAR's Global Top-50 ranking of Insights companies, discover the underlying factors that keep the industry moving forward, and the key players who were spotted surfing the wave.

5.1.1 Sectorial recovery

The global top-50 companies grew a combined 13% in 2021, after the sluggish growth registered in 2020. This result compares to an estimated 15,2% of absolute growth globally, showing the strong recovery of the industry and the excellent performance of medium-size companies (or at least those with turnovers below USD 350 million).

The strong performance of the global market, however, has resulted in a slight drop in market share for the Global Top-50 Insights Companies during 2021 as they are surpassed by global rates of growth. While the estimated market share for this ranking was estimated at 52.2% in 2020[1], it slid to 50.6% in 2021.

It is indeed clear that the industry has bounced back from the stifling uncertainty it experienced during 2020. As will be discussed later on, the necessity many companies had of treading unexplored technological paths to deliver insights has proved promising for the industry and its future by attracting unprecedented levels of investment in 2021.

1 The share has been updated from last year in light of improved estimates.

5.1.2 Growth of technology

In recent years, the technological side of the industry has shown consistent levels of growth, generally surpassing the most established counterpart. As technological development seeps through all levels of society and means of production, it also profoundly changes the tools at the professionals' disposal.

"Segments like Digital Data Analytics or Social Listening & Communities grew at stupendous levels during 2021"

The Lattice of Research from the 2021 edition of the Global Market Research report showed a 5-point growth in the market share of technology-enabled methods of research over the course of 2020 in detriment of established ones. In line with that same trend, 2021 saw yet another increase in the share of tech-enabled methods of 4 percentage points (please refer to Chapter 6 for further details). The share of passive research, which in 2020 had grown by up to 10 points, maintains its share in 2021, whereas active research increases by 1 point in detriment of the Reporting sector – data gathering wakes up from a year of relative slumber. Finally, the reliance in quantitative methods of collection seen in 2020 stops, giving way to a gain of up to 4 points of market share in qualitative methods during 2021.

Industrial segments like Digital Data Analytics or Social Listening and Communities (MarTech) grew at stupendous levels during 2021 and expanded by almost one fourth over that year. MarTech growth even during the pandemic was not only positive but higher than other industry segments. Furthermore, companies related to these segments, traditionally focused in the USA, are progressively setting their expansion plans in Europe and Asia Pacific. More strategic insight into the future of the Insights Industry can be found in ESOMAR's Evolution of the Data, Analytics and Insights Industry, a forecast into 2024.

5.1.3 Consolidation of players

The number of mergers and acquisitions (M&A) in the industry has been fuelled by what until very recently has been easy access to capital and the need to expand the portfolio of products and services. In an attempt to remain competitive and to respond to the clients' needs and demands, companies have increasingly positioned themselves at the forefront of the technological wave. While some invested substantial sums into in-house development, others enjoyed

the synergies obtained by targeted acquisitions aligned with their core (or intended) offer.

Probably the biggest arena for consolidation was found in the MarTech sector, where a number of the largest players declared notable growth originating from, precisely, mergers and acquisitions. The most representative example of this is Lightspeed with a growth of 227% over the year (as shown in the ranking).

Up to 40% of the turnover from the largest companies related to the MarTech sector was related to companies that had either been acquired, or had acquired. Almost all of the largest players with a significant turnover linked to Enterprise Feedback Management as well as Self-service Research Platforms had been involved in M&A activity. Most of the main Sample Panel Provider companies found themselves in a similar environment.

All in all, up to 20 of the Top-50 companies in the ranking, that is almost 50% of the total turnover reported by the entire ranking, saw a degree of M&A involvement in 2021.

"Up to 20 of the Top-50 companies in the ranking [...] saw a degree of M&A involvement in 2021"

5.1.4 Investment in the industry

Easy access to financial resources, high levels of industry consolidation, and sustained levels of capital return have turned the Insights Industry into an attractive ground for investors. 2021 seems to have positioned itself as the year where investors were piqued by the positive results and swift growth of remote and passive research imposed by the pandemic, and facilitated in part by technology and platforms.

Large levels of investment coupled with incursions by investment firms into other consultancy businesses provide a glimpse into the next realm with added value for the industry to leverage. Democratised data collection and movement towards democratising analysis point to services (consultancy, advisory, etc.) as the remaining pocket of excellent returns.

This notion still seems largely absent from many research agencies, as it is not uncommon for the reporting part of a project to be included in the budget at no extra cost. It is quite striking to think of all the added value that is being given for free while there is a parallel sector of the industry reaping sustained profits from these services.

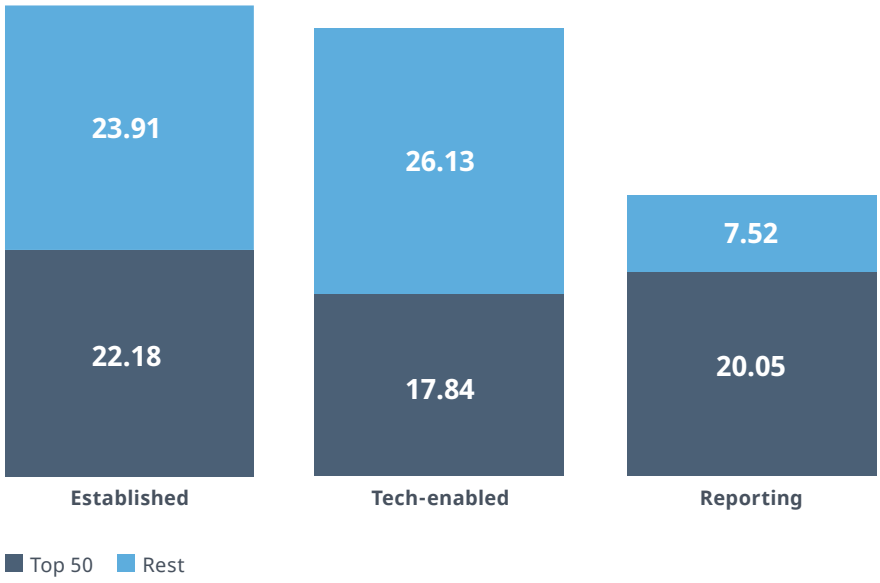
5.2 The ranking in perspective

5.2.1 Share of turnover globally

The global turnover for the insights industry for 2021 was USD 118.80 billion: a global established industry with a turnover of USD 46.09 billion, a technology-enabled one with a turnover of USD 43.97 billion, and lastly a reporting sector with a global value of USD 27.57 billion. This information enables us to estimate the share of the Global Top-50 Insights Companies to sit at 50.6%, a decrease of two percentage points compared to the level estimated for 2020.

It may come as a surprise that the share of the Top-50 largest companies has not increased after a year with such consolidation and influx of capital as the one described above. This is a possible hint of the blooming health of the industry – while there is heavy consolidation at the top, developing areas still remain as huge business opportunities. Investments in all segments of the industry paired with promising returns points at a yet unsaturated market.

Share of the Top-50 within their segment 2021
USD bn



5.2.2 Share per industrial sector

This sectorial fragmentation of the industry is a simplistic approach to the complex activity performed by companies. Most established firms have a substantial technological element in their revenue mix. Similarly, many firms that were born as software platforms now allow for deep analytical exercises. Companies that used to transform available secondary data into structured reports now have an established research branch for data gathering. The industry is complex, so we need a practical way to segment firms.

In order to successfully calculate the size of each sector in the industry, each company is assigned to one specific "realm" and its entire turnover[2] added to it.

The Global Top-50 Insights Companies are a mix of all these 3 realms: 37% of the turnover is taken by 14 companies related to the established industry, 30% is taken by 17 tech-enabled companies, and 33% by reporting companies.

It is possible to estimate the share of the largest companies within their assigned turnover segment The attached figure gives a glimpse of the existing levels of consolidation within the industry, especially in the Reporting sector where firms like Gartner, IHS Markit, Deloitte, McKinsey & Co. and others hold prominent positions of leadership. They represent up to 73% (US$ 20.05bn) of the sector's global turnover. On the other hand, the technology-enabled industry seems to have the largest room for consolidation, with leader companies representing a share of 41% (US$ 22.15bn).

2 The portion related to the creation of insights, that is.

5.2.3 Fastest growing firms

As explained in the previous sections of this chapter, investment has played a significant role for many of the Top-50 companies. Nowhere is this more significant than for Lightspeed. With an increase of 227% in its turnover the MarTech (or Digital Data Analytics) company, is a witness to the fast-paced capital outpour through rounds of investment and M&A's after its 2020 IPO.

In second place and with a growth of 47% is another MarTech company, Hubspot, which surpassed a USD 1 billion turnover in 2021 for the first time. This company, along with the growth of Salesforce and Adobe at the top of the segment (both of around 25%), have increased the growth of the Digital Data Analytics segment to 25%[3].

Qualtrics, placed within the Self-service Platforms sector, grew 41% over 2021. This was a result of a series of circumstances such as an IPO after a carve-out from parent company SAP, significant regional expansion into EMEA and Asia, as well as M&A activity involving Usermind, Clarabridge and SurveyVitals.

3 Digital Data Analytics conforms, along with Social Listening and Communities, Self-serve Platforms and Enterprise Feedback Management, the Technology-enabled Sector.

There are other significant fast-growing companies besides the top-3. Sitecore for example showed a growth of 30% after a significant round of financing above USD 1 billion as well as M&A involving Four51, Boxever and Reflektion. Other examples include Sprinklr with a growth of 27% heading for an IPO, the Boston Consulting Group with 41%, the America Institutes for Research with 33%, Bain & Co. with 30% or Salesforce with 26%.

Surprisingly, 28 out of 50, or more than half of all companies, reported double-digit interannual growth. Of these, 15 companies grew between 10 and 20% (mostly consulting, and industry reports firms), 7 grew between 20 and 30% (predominantly digital data analytics companies), 3 grew between 30 and 40%, 3 between 40 and 50%, and Lightspeed more than tripled in turnover (227%).

Remarkably, only 3 from the Global Top-50 Insights Companies declared negative growth in the past year: INTAGE with -0.5%, McKinsey % Co. with an estimated -2.2%, and PwC with -4.8% (the last two calculated on a best effort basis given the private nature of the firms). It is worth noting that The Nielsen Company was split into two entities (from where NielsenIQ was born), making their alleged negative growth level rather a mathematical oddity.

2020/21 Growth	Number	Breakdown *
10<x≤20%	15	6 Industry Reports & Research 3 Consulting Firms 2 Digital Data Analytics 2 Established Market Research 1 Enterprise Feedback Management 1 Social Listening & Communities
20<x≤30%	7	4 Digital Data Analytics 1 Social Listening & Communities 1 Established Market Research 1 Self-service Platforms
30<x≤40%	3	1 Established Market Research 1 Consulting Firms 1 Digital Data Analytics
40<x≤50%	3	1 Digital Data Analytics 1 Self-service Platforms 1 Consulting Firms
>50	1	1 Digital Data Analytics

* While we recognise that some companies may have a portion of their business related to more than one segment, for purposes of feasibility in our calculations a company's turnover is not split, and is instead assigned the segment that best describes their activity.

5.2.4 Changes in the ranking

With an estimated growth of 227%, it shall come as no surprise that Lightspeed is the firm that has gained the most in 2021. The company goes from barely making the ranking to reasserting itself in 32nd position.

Other companies with significant gains are Sitecore and Qualtrics, each gaining 6 places for reasons mentioned before, Bain & Co. and Boston Consulting Group, each gaining 5, Hubspot, American Institutes for Research, Salesforce, Zeta Global and Medallia gaining 2, and Sprinklr, IQVIA and Gartner each gaining 1 position.

The remarkable jump by some of the companies means that a large number of firms actually drop places despite having presented positive growth over 2021. Up to 28 companies let go of one or more positions in favour of those who posited higher growth. ■

Position in ranking	Breakdown *
Gaining places	5 Digital Data Analytics
	2 Consulting Firms
	2 Established Market Research
	1 Enterprise Feedback Management
	1 Self-service Platforms
	1 Industry Reports & Research
	1 Social Listening & Communities
Remaining	3 Industry Reports & Research
	2 Established Market Research
	1 Consulting Firms
	1 Digital Data Analytics
	1 Social Listening & Communities
Losing places	8 Established Market Research
	6 Consulting Firms
	6 Industry Reports & Research
	4 Digital Data Analytics
	1 Enterprise Feedback Management
	1 Sample Panel Provider
	1 Self-service Platforms
	1 Social Listening & Communities

* While we recognise that some companies may have a portion of their business related to more than one segment, fir purposes of feasibility in our calculations a company's turnover is not split, and is instead assigned the segment that best describes their activity.

INDUSTRY		COMPANY		
#	Segment	Company	Headquarters	Year founded
1 (+1)	Established Market Research (and Digital Data Analytics (MarTech))	IQVIA	Danbury, Connecticutt, USA	2016
2 (+1)	Industry Reports and Research (and Digital Data Analytics (MarTech))	GARTNER, INC.	Stamford, Connecticutt, USA	1972
3 (+2)	Digital Data Analytics (MarTech) (EFM (Enterprise Feedback Management) and Social Listening and Communities)	SALESFORCE.COM, INC.	San Francisco, California, USA	1999
4 (=)	Digital Data Analytics (MarTech) (and EFM (Enterprise Feedback Management))	ADOBE SYSTEMS, INC.	San Jose, California, USA	1982
5 (-4)	Established Market Research (Social Listening and Communities and Digital Data Analytics (MarTech))	THE NIELSEN COMPANY	New York, New York, USA	1923
6 (=)	Established Market Research (Sample Panel Providers and Self-service platforms)	KANTAR	London, England, UK	1993
7 (=)	Established Market Research	IPSOS SA	Paris, France	1975
8 (=)	Industry Reports and Research	IHS MARKIT	London, England, UK	1959
9 (=)	Industry Reports and Research	COSTAR GROUP	Washington DC, USA	1987
10 (New)	Established Market Research (Social Listening and Communities and Digital Data Analytics (MarTech))	NIELSENIQ	Chicago, Illinois, USA	1923
11 (-1)	Established Market Research (and Digital Data Analytics (MarTech))	IRI	Chicago, Illinois, USA	1979
12 (-1)	Consulting Firms (and EFM (Enterprise Feedback Management))	DELOITTE	New York, New York, USA	1845
13 (+2)	Digital Data Analytics (MarTech) (and Self-service platforms)	HUBSPOT, INC.	Cambridge, Massachusetts, USA	2006
14 (-1)	Established Market Research	GFK SE	Nuremberg, Germany	1934
15 (+5)	Self-service platforms (and EFM (Enterprise Feedback Management))	QUALTRICS	Provo, Utah, USA	2002
16 (-4)	Consulting Firms (Industry Reports and Research and Digital Data Analytics (MarTech))	MCKINSEY & COMPANY	San Francisco, California, USA	1926
17 (-1)	Digital Data Analytics (MarTech) (Established Market Research and EFM (Enterprise Feedback Management))	NICE SYSTEMS	Ra'anana, Israel	1986
18 (-4)	Consulting Firms (and Digital Data Analytics (MarTech))	BOOZ ALLEN HAMILTON	Mclean, Virginia, USA	1914

	2021	2020/21	2021	2020	2019/20
Ownership status	Total Insights Turnover	YOY change	Global Market share	Total insights turnover	YOY change
Public	5,209	19.6%	4.4%	4,355	5.2%
Public	4,734	15.5%	4.0%	4,099	-3.4%
Public	3,902	25.9%	3.3%	3,100	23.7%
Public	3,867	23.7%	3.3%	3,125	-2.5%
Public	3,500	-44.4%	2.9%	6,290	-3.2%
Public	3,029	8.7%	2.5%	2,787	-8.2%
Public	2,539	21.0%	2.1%	2,099	-6.4%
Public	2,133	13.2%	1.8%	1,884	-10.9%
Public	1,944	17.2%	1.6%	1,659	18.5%
Public Subsidiary	1,844	-	1.6%	-	-
Private (PE)	1,550	10.7%	1.3%	1,400	7.7%
Private	1,323	8.0%	1.1%	1,225	28.7%
Public	1,301	47.3%	1.1%	883	30.8%
Private	1,110	8.0%	0.9%	1,028	-9.3%
Public Subsidiary	1,076	40.9%	0.9%	764	29.2%
Private	1,050	-2.2%	0.9%	1,074	-7.0%
Public	1,002	18.2%	0.8%	847	6.8%
Public	1,000	6.0%	0.8%	943	5.3%

INDUSTRY		COMPANY		
#	Segment	Company	Headquarters	Year founded
19 (-2)	Consulting Firms (and Digital Data Analytics (MarTech))	ACCENTURE	Dublin, Ireland	1989
20 (-2)	Digital Data Analytics (MarTech) (and Self-service platforms)	MAILCHIMP	Atlanta, Georgia, USA	2001
21 (+7)	Consulting Firms	ERNST & YOUNG	London, England, UK	1989
22 (-3)	Social Listening and Communities	CISION AB	Chicago, Illinois, USA	1867
23 (-2)	Sample Panel Providers (and Self-service platforms)	DYNATA	Plano, Texas, USA	1999
24 (+4)	Consulting Firms (Established Market Research and Digital Data Analytics (MarTech))	BOSTON CONSULTING GROUP	Boston, Massachusetts, USA	1963
25 (-1)	Consulting Firms	KPMG	Toronto, Ontario, Canada	1987
26 (-1)	Industry Reports and Research (and Consulting Firms)	VERISK ANALYTICS	Jersey City, New Jersey, USA	1971
27 (-5)	Consulting Firms (and Digital Data Analytics (MarTech))	PWC	London, England, UK	1998
28 (-5)	Digital Data Analytics (MarTech) (and EFM (Enterprise Feedback Management))	ORACLE CORPORATION	Austin, Texas, USA	1977
29 (+2)	EFM (Enterprise Feedback Management) (Social Listening and Communities and Established Market Research)	MEDALLIA	San Mateo, California, USA	2001
30 (-4)	Industry Reports and Research (and Digital Data Analytics (MarTech))	IDC (OWNED BY IDG)	Needham, Massachusetts, USA	1964
31 (+6)	Digital Data Analytics (MarTech) (and Self-service platforms)	SITECORE	San Francisco, California, USA	2001
32 (+17)	Digital Data Analytics (MarTech)	LIGHTSPEED	Montréal, Quebec, Canada	2005
33 (+5)	Consulting Firms (Industry Reports and Research and Established Market Research)	BAIN & COMPANY	Boston, Massachusetts, USA	1973
34 (-4)	Social Listening and Communities (and Consulting Firms)	GERSON LEHRMAN GROUP (GLG)	New York, New York, USA	1998
35 (-1)	Digital Data Analytics (MarTech) (Self-service platforms and Established Market Research)	LIVERAMP	San Francisco, California, USA	1969
36 (-9)	Established Market Research	INTAGE	Tokyo, Japan	1972

	2021	2020/21	2021	2020	2019/20
Ownership status	Total Insights Turnover	YOY change	Global Market share	Total insights turnover	YOY change
Public	982	19.3%	0.8%	824	0.2%
Public Subsidiary	970	21.3%	0.8%	800	14.3%
Private	957	13.6%	0.8%	842	2.3%
Private (PE)	772	0.0%	0.6%	772	0.8%
Private	760	9.1%	0.6%	697	3.2%
Private	726	40.7%	0.6%	516	1.2%
Private	675	15.5%	0.6%	584	-2.2%
Public	649	16.3%	0.5%	558	-2.7%
Private	613	-4.8%	0.5%	644	4.4%
Public	604	3.3%	0.5%	585	1.8%
Private	570	19.4%	0.5%	477	18.6%
Private Subsidiary	564	5.4%	0.5%	535	-2.7%
Private	557	30.0%	0.5%	429	-1.0%
Public	542	227.4%	0.5%	166	82.1%
Private	534	30.1%	0.4%	410	-4.7%
Private	531	3.0%	0.4%	515	1.0%
Public	525	18.5%	0.4%	443	16.4%
Public	524	-0.5%	0.4%	527	2.1%

INDUSTRY		COMPANY		
#	Segment	Company	Headquarters	Year founded
37 (-5)	Industry Reports and Research (Consulting Firms and Established Market Research)	FORRESTER RESEARCH, INC.	Cambridge, Massachusetts, USA	1983
38 (+1)	Social Listening and Communities (and EFM (Enterprise Feedback Management))	SPRINKLR	San Francisco, California, USA	2009
39 (-6)	Industry Reports and Research (and Established Market Research)	THE NPD GROUP, INC.	Port Washington, New York, USA	1966
40 (-5)	Industry Reports and Research (and Digital Data Analytics (MarTech))	J.D. POWER	Troy, Michigan, USA	1968
41 (+2)	Digital Data Analytics (MarTech) (and Self-service platforms)	ZETA GLOBAL CORP.	New York, New York, USA	2007
42 (-1)	Self-service platforms (Sample Panel Providers and EFM (Enterprise Feedback Management))	MOMENTIVE	San Mateo, California, USA	1999
43 (-7)	Established Market Research	DUNNHUMBY LTD.	London, England, UK	2001
44 (=)	Social Listening and Communities	MELTWATER GROUP	New York, New York, USA	2001
45 (-5)	Established Market Research	MACROMILL GROUP	Tokyo, Japan	2000
46 (+2)	Established Market Research (and Digital Data Analytics (MarTech))	AMERICAN INSTITUTES FOR RESEARCH (AIR)	Washington DC, USA	1946
47 (-5)	Industry Reports and Research (and Established Market Research)	RAND CORPORATION	Sana Monica, California, USA	1948
48 (-3)	Established Market Research (Social Listening and Communities and Digital Data Analytics (MarTech))	COMSCORE	Reston, Virginia, USA	1999
49 (-2)	Industry Reports and Research (and Established Market Research)	ASCENTIAL	London, England, UK	1947
50 (-4)	EFM (Enterprise Feedback Management) (Digital Data Analytics (MarTech) and Social Listening and Communities)	VERINT	Melville, New York, USA	1994

	2021	2020/21	2021	2020	2019/20
Ownership status	Total Insights Turnover	YOY change	Global Market share	Total insights turnover	YOY change
Public	494	10.1%	0.4%	449	-2.8%
Public	492	27.3%	0.4%	387	19.3%
Private	478	6.5%	0.4%	449	2.0%
Private	464	6.0%	0.4%	438	43.4%
Public	458	24.5%	0.4%	368	20.3%
Public	451	20.0%	0.4%	376	22.2%
Private	445	2.4%	0.4%	435	-4.4%
Public	403	11.5%	0.3%	361	4.5%
Public	393	1.7%	0.3%	387	-
Non-profit	374	33.2%	0.3%	281	-38.5%
Non-profit	373	1.2%	0.3%	368	-2.7%
Public	367	3.1%	0.3%	356	-
Public	362	14.9%	0.3%	315	-11.5%
Public	350	5.3%	0.3%	332	-1.9%

6. The Lattice of Research Methods

by Xabier Palacio

Companies and methods rarely go hand in hand. This is demonstrated each time a company claims to merge qualitative and quantitative research or when an established firm feels that it should be recognised for its strong tech-enabled product portfolio.

The data required to tackle each research "problem" may be gathered through very diverse methods, and companies were never limited in their usage of them!

Established firms use tech-enabled methods, and tech-enabled firms use established ones. Quantitative agencies may add qualitative methods to their toolbox, and face-to-face companies may complement their offer with passive collection.

This is the reason why, despite the large number of countries declaring only the turnover of their established industry, Chapter 9, tables 9.3.2 through 9.3.4 do include their usage of tech-enabled methods – nothing stops established companies from using tech-enabled methods of data collection. These breakdowns will become more refined as countries increasingly include all three sectors of the insights industry since the competitive arena is the same for all.

At a global level, quantitative passive methods dominate the research data gathering landscape with 56.5% of global spending. The graph below clearly shows a well-known challenge for tech-enabled methods, which is their application to qualitative data gathering, now at less than 3%.

The lattice of research methodologies

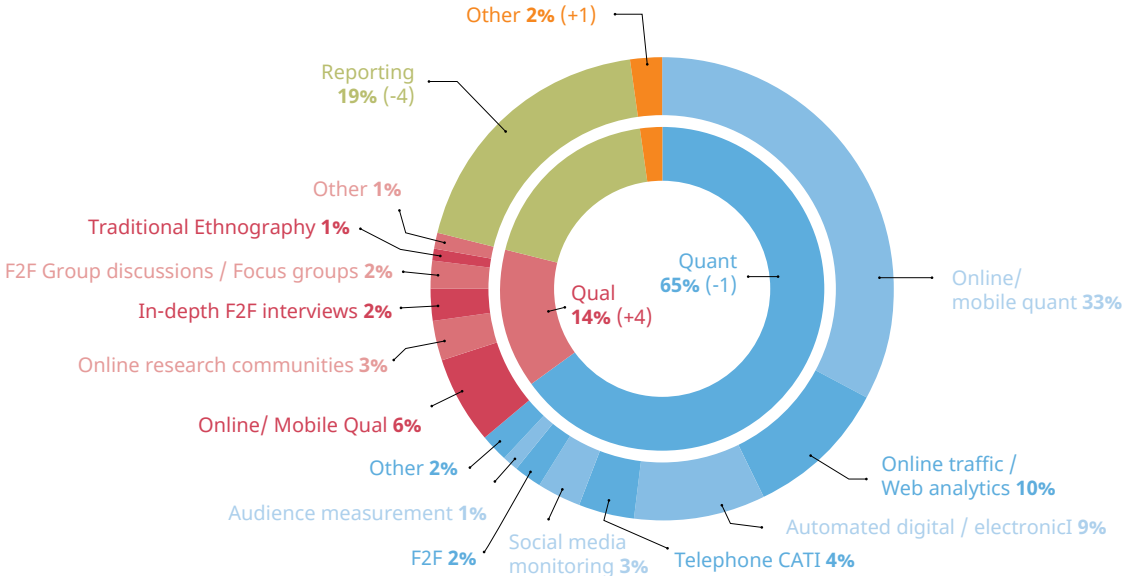
6.1 Quantitative/qualitative methods

Recovery from the pandemic in some of the largest markets has helped revive some of those methodologies most harmed by social distancing policies or the need for remote research. The 2021 edition of the Global Market Research report observed the fall in the share of qualitative data gathering by up to 3 percentage points, a sign of a yet immature remote qualitative tech-enabled skillset. Conversely, the share of the reporting industry grew by 2 points as a result of available budgets being diverted from hampered primary research activity to secondary analysis and reports.

The trend reversed in 2021 as the population learned to cohabit with the virus, companies adapted their processes, and countries relaxed some of the regulations. While it is premature to draw conclusions, it seems apparent that the tech-enabled methods and remote research (such as online surveys) that surged in 2020 still remain popular choices. Quantitative methods lose one percentage point and represent 65% of all industrial activity.

Qualitative methods, however, make a strong comeback, gaining 4 percentage points and now represent 14% of

Spend by quantitative/qualitative methods



turnover. This remarkable rise brings them not only in line with the level observed in 2019 (13%) but surpasses it slightly, showing the need for more nuanced insights and the health of these types of methods.

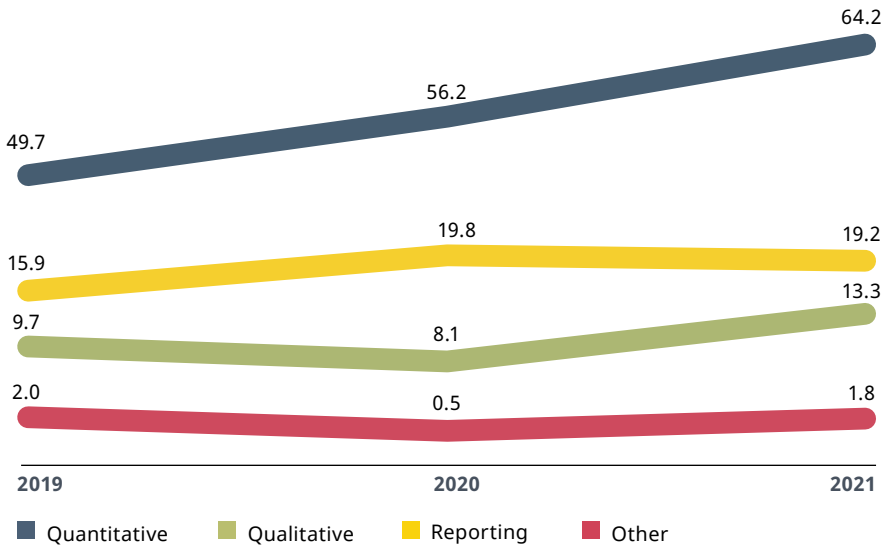
While no direct transfer can be assumed between categories, at least part of the gain in qualitative methods of research was obtained from the industry's reporting sector. The representation of this branch diminishes by 4 points, presumably as the need for secondary research "as an alternative to primary" cools down.

As the industry grows, so does the usage of several research methods in monetary terms. And while the reporting sector showed flat turnover between 2020 and 2021, its representativity within the global industry fell from 23% to 19%. The most significant growth can be seen within qualitative methods of research. These different methodologies, challenged during the harshest moments of the pandemic, show the most significant comeback with over 60% of growth from US$ 8.1 billion in 2020 to US$ 13.3 billion in 2021.

Research spending on quantitative methods of data collection, however, dominates the industry with an expansion of almost US$ 15 billion since 2019. The faster-than-average growth levels of tech-enabled methods of research, usually more quantitative in nature, point towards a sustained growth of this typology over time, presumably increasing its share of turnover.

Spend per type of methodology - qualitative/quantitative

(US$ bn)



Quantitative research is particularly common in Europe, while qualitative methods remain prevalent in Asia Pacific, Latin America, Africa and the Middle East. A closer look at the shares of passive versus active methods of research may shed further light on this area, particularly if these regions present a higher usage of active ones – qualitative methods tend to be active.

Continued advancements in technology will likely allow for further expansion of qualitative data gathering in the overall mix. However, it will also facilitate the collection of an increased amount of data for analysis, further blurring the lines between what the industry has traditionally called quantitative and qualitative. This simple dichotomy has aided the differentiation of research in the past few decades. But time will show whether it will continue to make sense in the age of the democratisation of data gathering.

6.2 Established/tech-enabled methods

The declared portion of the global industry turnover – that which allows us to identify the breakdowns in, in this case, methodologies for data gathering – shows the recovery of certain established methods of data collection. The fact that most countries limit their national surveys on the industry to the established sector explains a great deal of why this phenomenon is observed. Still, this is further evidence of the reversal in the trends witnessed during the pandemic, where tech-enabled methods of collection, paired with secondary data research, filled the gap left by a hindered established methodology.

The return of established methods of collection should not distract from the conclusions arrived at in earlier chapters. Any company related to any type of sector – whether established, tech-enabled or reporting – may choose to implement whichever type of methodology they deem more suitable in their business, be it an established method or a tech-enabled method. Gone are the days when industry sectors and methodologies coincided.

Online qualitative and quantitative methods of collection continue to grow, and 2021 represented 38.4% of global spending, compared to 36.1% in 2020. As argued in previous editions of this report, online qualitative and quantitative methods belong to the established sector because, even though they require technological equipment in their deployment, the underlying mechanics are historically grounded. Methods like online traffic, however, are effectively enabled by technology; they could not exist without it.

The undeclared portion of the global insights industry (which amounts to a “hidden” 17% of the total) largely belongs to the technology-

enabled sector. Given that this sector tends to primarily use tech-enabled methodologies for data collection, it is reasonable to assume that the portion dedicated to tech-enabled methods remains somewhat misrepresented. It is possible that, had all countries included the tech-enabled sector in their measurement of the industry, these types of methodologies would not have fallen by 3 percentage points.

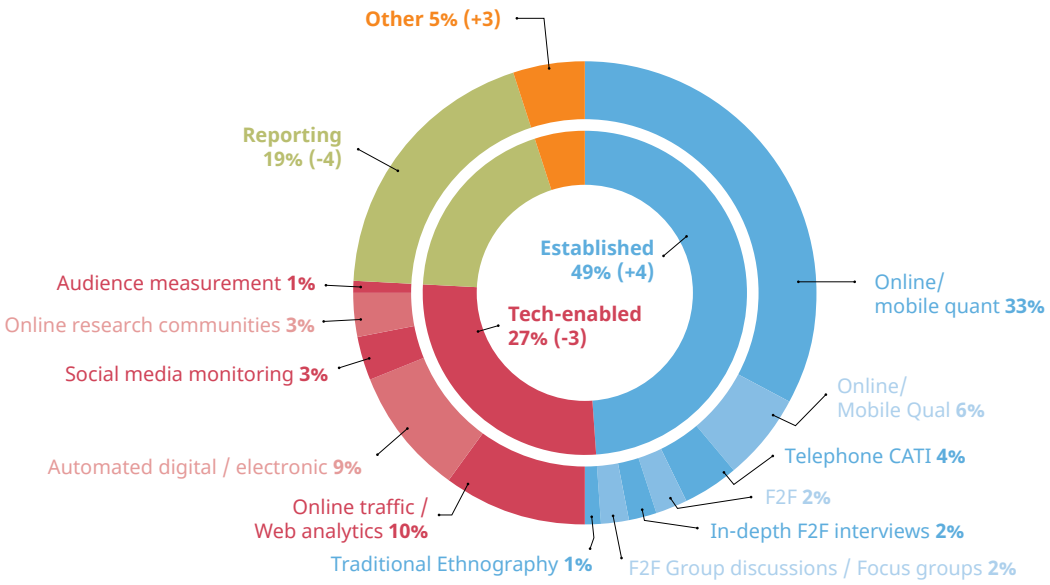
The trend observed in previous years shows the slowdown experienced by the established methods of research, which fell by -3.0% in 2020. In 2021, though, the trend picked up the pace and jumped by almost US$ 10 billion to over US$ 48.2 billion.

Here becomes evident the variety of methods used by players within the industry. While the global established sector is estimated at US$ 46 billion, companies from either sector generated up to US$ 48 billion utilising established methods. Here lies the further proof of the dislodgement of methodologies and industrial sectors explained earlier.

Likewise, tech-enabled methods of research continue to grow and expand by more than US$ 2 billion to US$ 26.3 billion. A significant portion of these methodologies are, in fact, implemented by established companies – in many countries, they represent the bulk of the local turnover.

Africa, the Middle East and Asia Pacific are the areas where countries have identified the largest share of established methods – though countries like China or Japan only survey the

Spend by established/technology-enabled methods



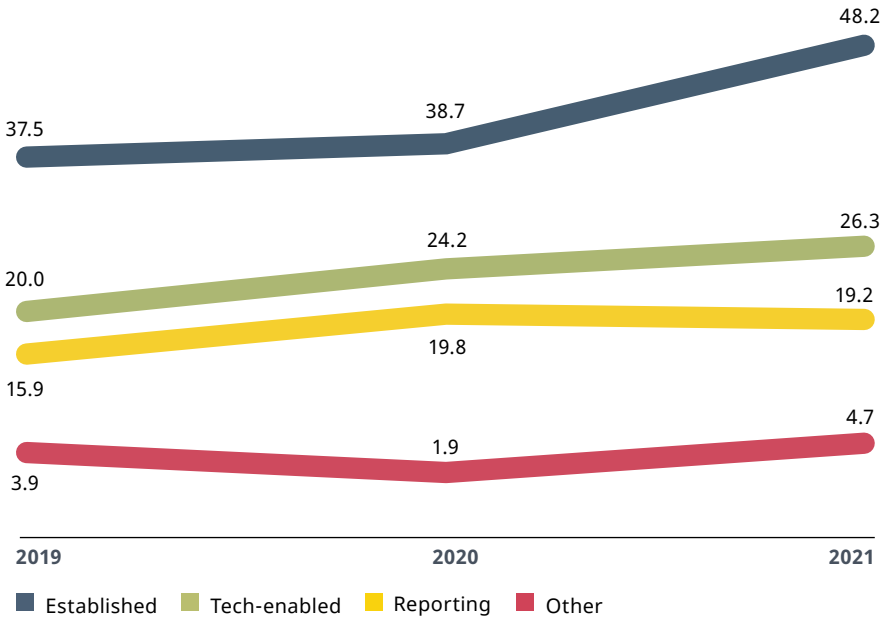
established industrial sector. Conversely, North America and Europe represent the regions with heavier usage of tech-enabled methods, even though countries like France, Germany, Italy or Spain do not survey the tech-enabled sector.

It is worth noting that a substantial amount of global turnover is categorised as “other” methods, US$ 4.7 billion.

Should this share continue to grow over time, it would suggest the existence of a new array of research methodologies that remain uncategorised and which may be worth codifying in our questionnaire. We will remain alert to identify in future editions of this report the movement from hype to conventional new methods of data gathering.

Spend by established/technology-enabled methods

(US$ bn)



6.3 Active/passive methods

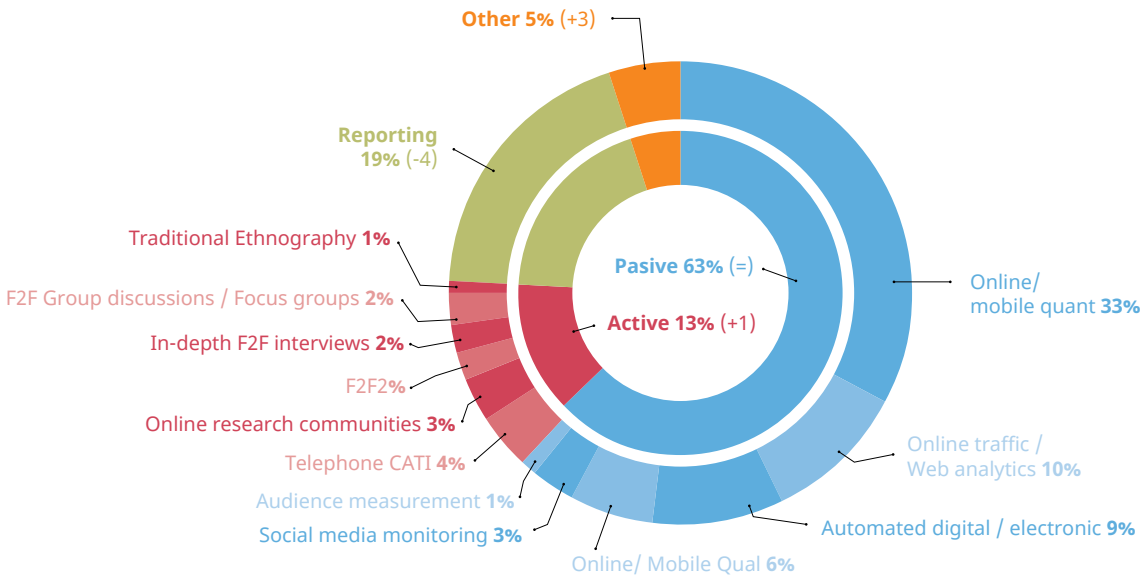
The last step in the lattice of research is the comparison between active and passive methods of data collection. An interesting observation is the levelling of passive data collection at 63%. This typology already gained 10 percentage points in 2020 due to social distancing measures and other limitations imposed by the pandemic. Rather than returning to a level closer to its pre-pandemic share, passive methods maintained this level over 2021. Passive data gathering, particularly online quantitative and qualitative research with a combined 38%, dominates the industry.

Active data gathering, however, gains one percentage point and increases to 13%, primarily fuelled by established and tech-enabled quantitative methods.

Time will show whether this segment remains at this level or continues to lose ground as passive methods consolidate their foothold in the global arena.

Only a selected number of data gathering methodologies show higher levels of expenditure than in 2019. They are two passive quantitative tech-enabled methods – online traffic / web analytics and automated digital/ electronic –, a passive quantitative established – online quantitative research –, an active qualitative established – in-depth face-to-face interviews –, a passive qualitative established – qualitative research – and an active qualitative tech-enabled one – online research communities.

Spend by active/passive methods

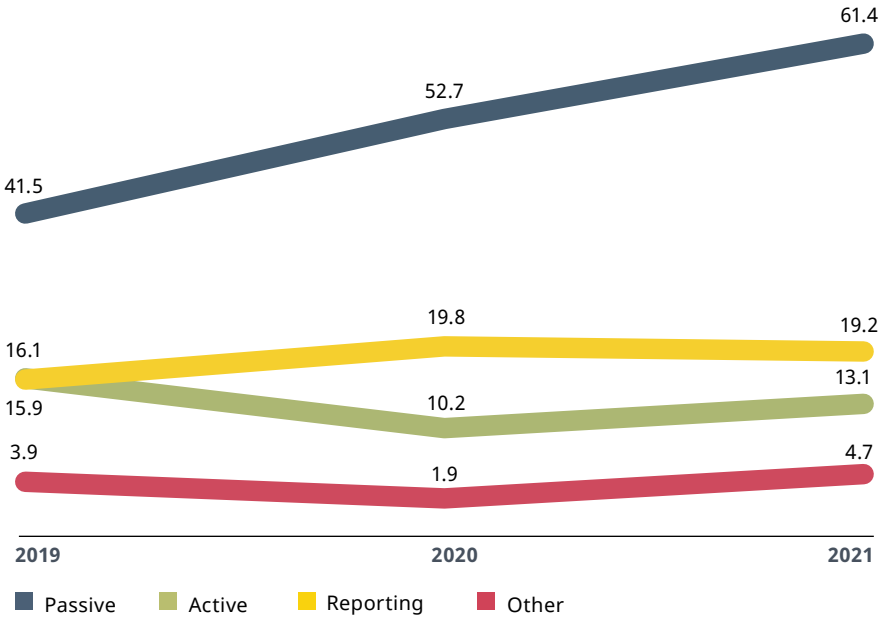


Much like with qualitative methods, the predominance of passive quantitative tech-enabled methods of collection may suggest a further decline in active research. However, just as technology becomes more able to tackle qualitative data collection, so will it also allow for more sophisticated forms of active data gathering. But until these new developments make a dent in the relative shares of these typologies, active methods will likely remain in the minority.

The pandemic accelerated in some countries the growth of new, generally passive quantitative tech-enabled methods of data collection. And there is ground to believe that this acceleration did not mean a transfer of budgets but rather the reinforcement of a specific type of passive industry. The proof is the continued growth of passive methods compared to active ones instead of a return to their pre-pandemic shares.

Passive methods grew in 2021 by almost US$ 9 billion and now represent US$ 61.4 billion globally. Translated to 16.7%, this growth is lower than active methods, which crept up almost 28% to more than US$ 13 billion. But it is worth noting the 48% growth in passive methods since 2019, compared to the negative one of -18% declared by active ones. Again, while active methods may increase their share in the future, the data suggests a rather prolonged period of dormancy for now.

Spend per passive/active methods
(US$ bn)



Active research, nonetheless, allows for the gathering of far more nuanced data. While oftentimes comparatively expensive to implement, a complete research project will, at times, benefit from the detail captured by active methods of data gathering. Other times, it simply becomes easier and more accurate to cast questions to the individual directly rather than to scramble behavioural data indirectly through unstructured data. The partial recovery of its trend shows the recognised relevance of this typology within the industry, though further growth in the share of active data collection in the near future may be caused by a technological push. ■

7. Project goals and design

by Xabier Palacio

The pandemic forced the industry to adapt to a new reality quickly. Clients needed to understand almost from scratch a consumer base which had changed entirely overnight, pushed to a set of new habits by the protectionary policies created by governments. And the uncertainty of this unprecedented situation brought a large portion of ongoing research studies to a halt, leaving only the longer-term contractual agreements in place. We explore how project types and study designs continue to shift over time and identify trends that were already growing and simply accelerated.

7.1 Project types – purpose for research

The weight of the US on the world stage becomes apparent when observing the trends of some selected project types at a global level. Much of the growth in CRM systems with a +145% increased share over the 2018-2021 period, employee satisfaction studies with +135%, and user experience research with +100% stem from a remarkable increase in these types of projects in this country.

However, almost all of the world's regions experienced a substantial increase in user experience research since 2019, even though it still represents a low share of spend for most of them. Some regions like Europe, Asia Pacific and Africa doubled their share of this project type with +186%, +97% and +295%, respectively.

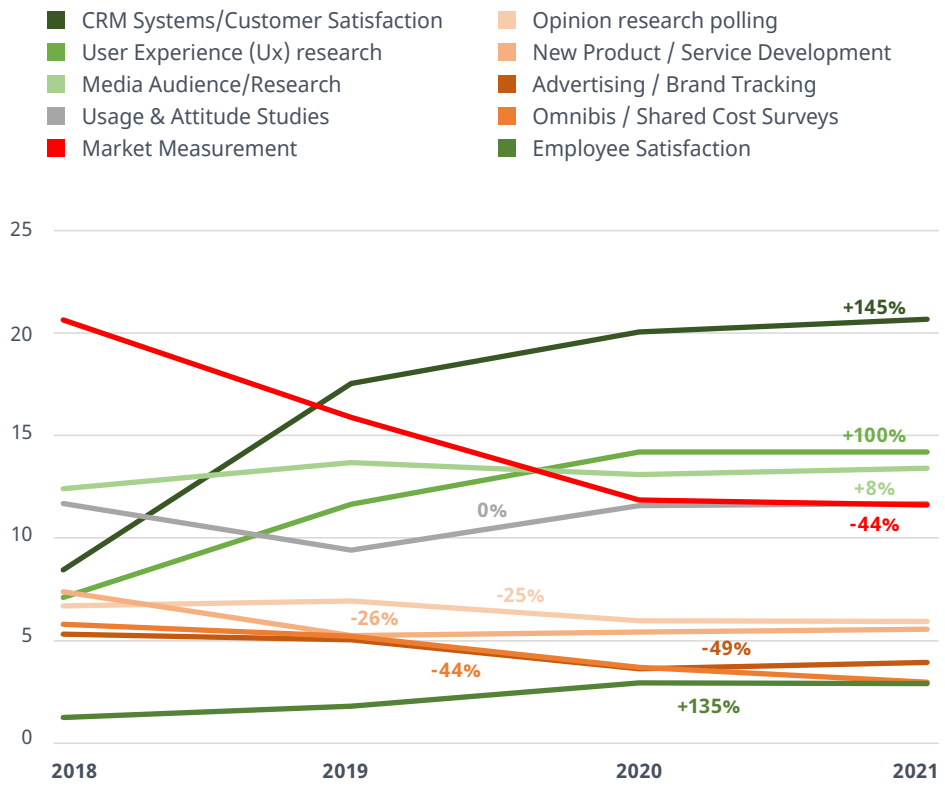
Research utilising CRM systems for customer satisfaction grew only in Europe, North America and Asia Pacific since 2019. The largely tech-enabled implementation of methods usually chosen for these types of projects intuitively shows the reason behind this growth. Judging by the low level of turnover garnered through these project

types in 2018, this market appears to be relatively immature. A look at the list of top insights companies presented in chapter 5, however, shows the fantastic potential that exists for these project types. The turnover of the third largest company alone, Salesforce, represents around one-fifth of global spending.

It is interesting to consider customer satisfaction and user experience projects in combination with usage and attitude studies, particularly when looking at their behaviour during 2020 – the latter shows a stable share but monetary growth between 2018 and 2021. The pandemic forced a substantial proportion of the world's population to adapt to a new reality they had not foreseen, nor had they wished for. This new set of circumstances effectively created an unknown type of consumer that required understanding. Interest in responding to these questions cooled down over 2021 globally, though they still showed the largest growth rates.

Conversely, market measurement projects stumbled during 2020, as the worldwide shock temporarily froze the expansionist desires of companies. New product development similarly

Global spend per selected project types (%)

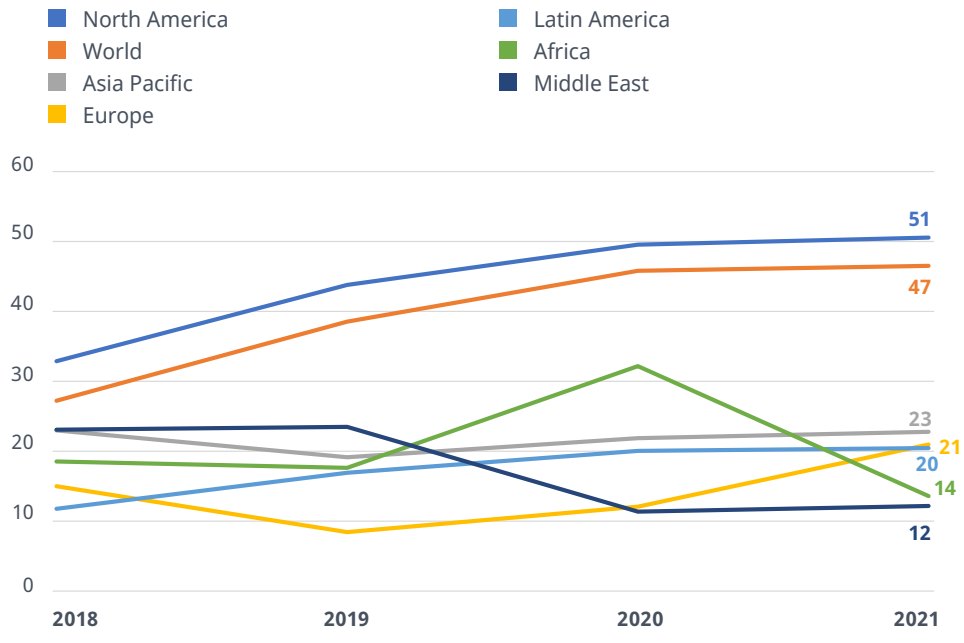


slowed down along with advertising/ brand tracking, as marketing efforts were redirected towards an entirely new set of home devices. While market measurement recovered slightly over 2021, it still displayed a 44% decline over the 2018-2021 period.

Lastly, omnibus/shared cost surveys continue their downward trend, presumably fuelled by two parallel phenomena. On the one hand, the pandemic slowed the signing of new, coordinated projects. Instead, clients focused their spending on a limited number of ad hoc projects and started bringing more research in-house through self-service platforms. On the other hand, a larger portion of the research seems to have a more specific intent through panel research, with data gathered over time with a clear goal in mind. With -49%, Omnibus has declined every year between 2018 and 2021.

Share of customer satisfaction

user experience and usage and attitude projects per region, (%)



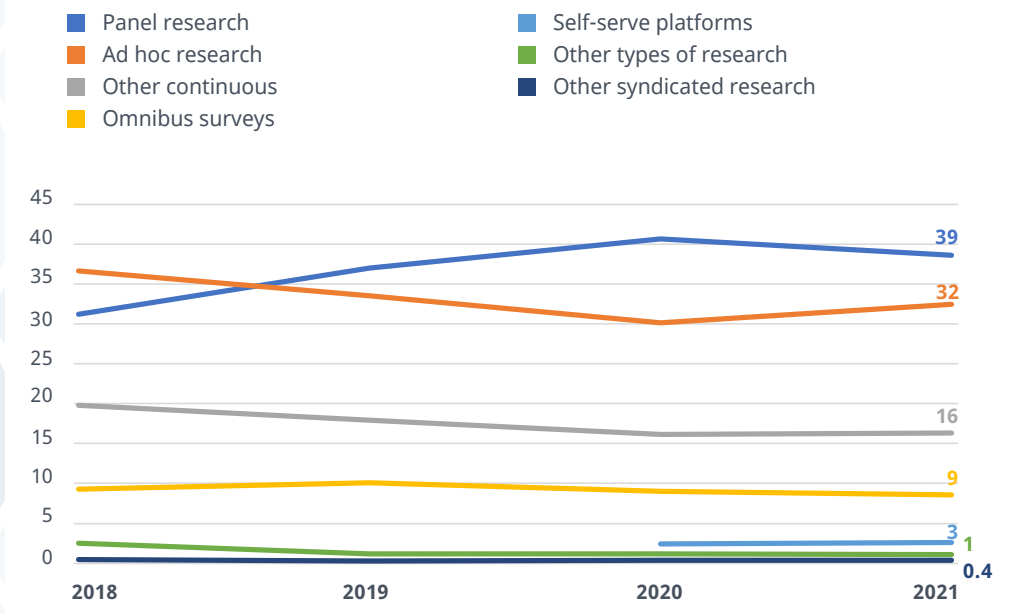
7.2 Study design – contractual scope

A look at the trend of study designs over time shows the instability of the past couple of years as well. The uncertainty experienced in the wake of the pandemic froze research temporarily while clients and agencies alike reassessed the situation at hand. The only types of projects that remained were longer-term commitments between the parties, such as panel research, which came to represent the largest share of study designs in the year 2020.

Panel research slowed somewhat in 2021 to 39% of total turnover, while ad hoc research gained momentum and grew by two percentage points to 32%. This type of study design, the most popular in 2018, has steadily lost ground in favour of panel research. The lack of a downward trend, however, shows the prevalence of both, and their title of most popular design will likely swap places repeatedly in upcoming years.

Global spend per study design

(%)



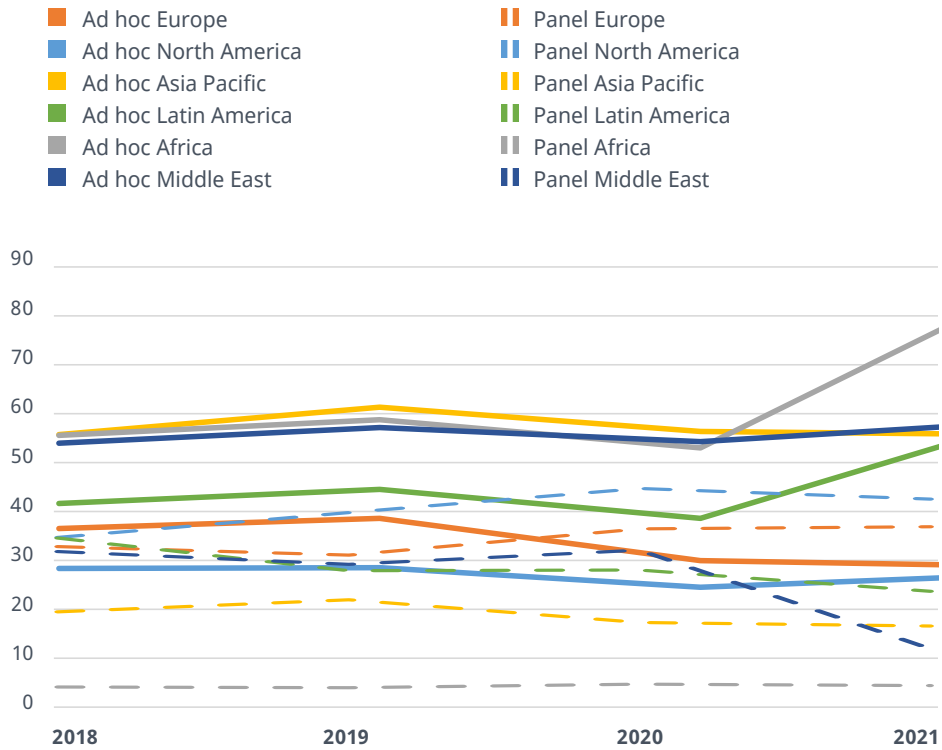
Self-serve platforms were recently added as a new type of study design. This type of flexible contractual arrangement, whether with end research clients themselves or with other research providers, allows for a wide array of studies which could not possibly be categorised under the other labels. While at just 3%, self-serve platforms still represent a small portion of the total, their potential is made ever clearer by the enormous amounts of capital that have recently poured over the sector. As mentioned in Chapter 5, this industry segment grew the fastest over 2021 and shows no signs of slowing down.

We look forward to seeing how the different elements of the industry come together in upcoming years to move the dials across methodologies, project types and study designs. The growth of more technological solutions may open up the opportunities for more in-house research, thereby boosting the global share of self-serve platforms or may simplify the continuous tracking of consumers. These and other questions will be tackled over time.

The behaviour observed above holds true for most of the world's regions. While ad hoc research fell during 2020 in every

Regional spend for panel and ad hoc research

(%)



region, it regained part of its lost ground in 2021 except in Europe and Asia Pacific. The opposite is true for panel research. It increased its share of spend within the industry during 2020 in all regions except for Asia Pacific but lost part of that share in all regions in 2021.

The prevalence of panel research in Europe and North America points to interesting differences in the mechanisms of the industry around the world. These are the only two regions where ad hoc research, in fact, sits below panel research. Their combined massive weight on the world stage pushes panel research above ad hoc research at a global level, though a closer look at regional shares paints a very different picture.

This points to a phenomenon of decentralisation since some study designs allow for their remote implementation. Paired up with technological advancements, the natural conclusion is a growth of these kinds of designs primarily in regions with a stronger tech-enabled sector, such as North America and Europe, at the expense of other ones with more face-to-face setups.

Lastly, other continuous research seems to be steadily losing ground at a global level. This label of different uncategorised types of continuous research continues to give way to the only two growing study designs in the industry since 2018: panel research and self-serve platforms. We will remain alert to the development of future contractual arrangements as they adapt to the emergence of new technological capabilities. ■

8. The sources of turnover

by Xabier Palacio

8.1 Domestic/international clients

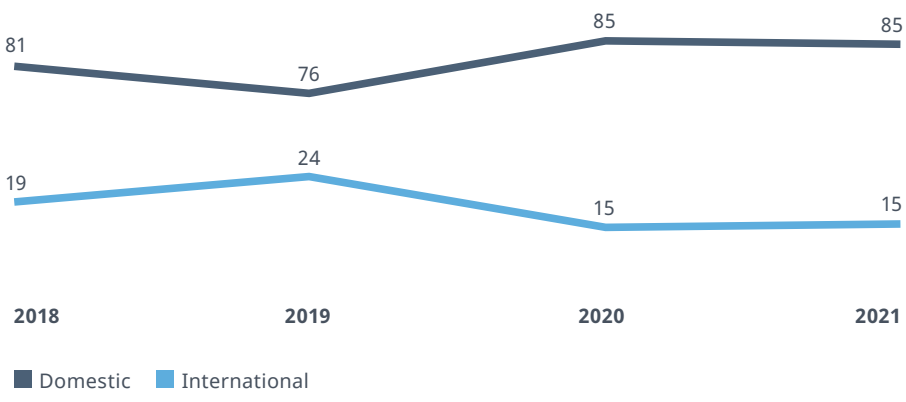
Clients decide the success and the fate of their providers. Their requests and requirements dictate which tools will be utilised for a given task. And their available budgets become the industry's turnover. But in a globalised world, the origin of clients may shed light on the volume of international flows of capital.

As was the case for every other aspect of the industry, the pandemic brought to a halt a large part of the research activity during 2020. Closure of international borders, lockdowns and inability to travel depressed international presence in the countries. The share of research commissioned by international clients fell by 9 percentage points to 15% and has remained flat ever since.

It is clear that a big push to bring the levels of activity back to pre-pandemic levels came from domestic players. The fact that their share remained equal in 2021 as it was in 2020 (85%) while the overall industry grew by more than 10% in net terms shows that most of the value generated – more than US$ 10 billion – was, in fact domestic.

Not all regions observed an increase in the demand from domestic clients, though. Asia Pacific is an example of a region with a reversed impact and a substantial growth in commissioned

Origin of clients
(%)



research by international clients from 12% in 2019 to 23% in 2020, a trend which remained stable over 2021. Latin America follows a similar trend, with the share of international clients growing from 13% in 2019 to 15% in 2020 and retaining that level in 2021.

A speculative reason why this may be the case is the presence of larger native clients in Europe and North America with a wide international presence which may have retained the ability to sustain demand over time thanks to the unequal spread of the disease globally. Smaller clients in other countries as can be the case in Asia Pacific and Latin America, however, may not have had the chance to divert funds and would have felt the impact at once. In these cases, international players would have been in a prime position to stimulate demand in the country, increasing their share ahead of local clients without the availability of resources.

8.2 Type of client

The largest client sectors worldwide are heavily influenced by the peculiarities of the USA, a market dominated by the pharmaceutical industry (the only region in the world where this is the largest client) and Media and Broadcasting. In all other regions of the world, the main client sector is consumer non-durables (FMCG), ranging from 18% in Asia Pacific, around 30% in Europe and Latin America, and even higher in Africa and the Middle East.

Other manufacturing sectors, such as consumer durables, are prominent in Latin America (particularly due to the weight of Mexico) with a share of 17%. It is smallest in Europe (2.9%) and Asia Pacific (4.9%), where it lost ground steadily over the past 4 years, presumably due to a shift in data providers to media agencies and increased non-established methods of data collection. The public sector also remains an important client in Asia Pacific with a share of 14%, thanks to the prominent role it plays in China (20%), Australia (25%), South Korea (44%) and New Zealand (22%). Lastly, not-for-profit and other international organisations are particularly important in Africa and the Middle East, with a share of 24% and 16%, respectively. The non-profit sector is particularly large in Nigeria (25%), Lebanon (80%), and Iraq (50%).

"a big push to bring activity back to pre-pandemic levels came from domestic players"

At a global level, though, the consumer non-durables sector seems to be losing ground in relative terms, even though its yearly expenditure increased from US$ 13 to US$ 15 billion between 2018 and 2021. Reasons for this shift could be attributed to two trends playing out simultaneously. Firstly, the industry experienced a surge in research from other sectors such as IT and telecommunications (which

grew from 5% in 2018 to 8% in 2021) which challenged the hegemony of research commissioned by consumer non-durables clients. Their combination with growing, and new, types of research projects such as consumer/user experience and CRM systems (please see Chapter 7) helps explain this trend further.

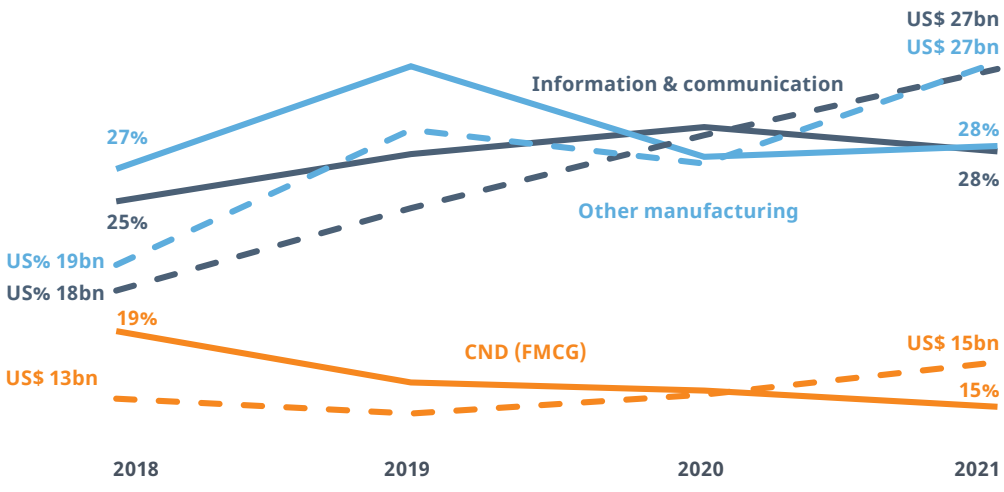
Secondly, we find other emergent trends such as the increased usage of in-house research through platforms and self-acquired data, or a sense of caution in expenditure after the pandemic, particularly for a sector with relatively low margins for profit.

As a result, the information and communication super-sector (which includes advertising, telecommunications and ICT, and media and broadcasting) briefly became the largest global client in 2020 with 29%, only to be surpassed by the manufacturing super-sector (consumer durables, pharmaceutical, and automotive) in 2021, both at 28%.

Public administration and international organisations and NGOs will likely continue to play a relevant role in the future, particularly as the aftermath of the pandemic undermines the already precarious situation some countries found themselves in before the outbreak.

Selected industry sectors

CND (FMCG), other manufacturing, and infomation and communication (US$ bn, %)



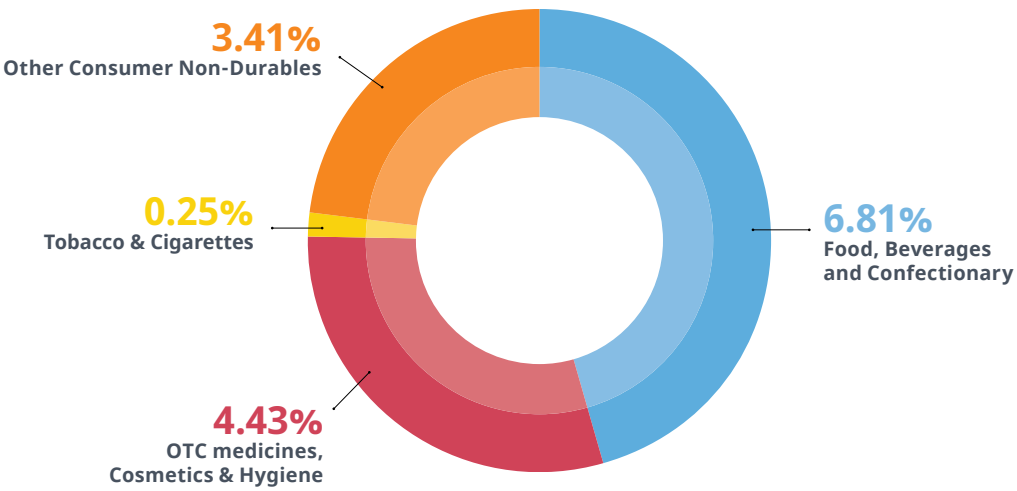
8.2.1 Breakdown of consumer non-durables

The pattern of research spending in the consumer non-durables sector has been shifting substantially over the years. The entire segment moved from a global share of 23% in 2006 down to 22% in 2011, 20% in 2016, and finally 15% globally in 2021. While each region has unique industries and peculiarities, the downward trend of consumer non-durables as a client over the years is undeniable.

Changes in consumption patterns explain, at least partially, some of the trends observed in this segment. The share of tobacco and cigarettes, for instance, all but disappeared in 2021, having seen a consistent downward trend in the last 15 years from 3% in 2006 to just 0.25% in 2021. Limitations in advertising or downright bans in the marketing of these harmful products have downsized the expenditure of this industry to a record low. The only countries with significant demand from this type of client are Pakistan (20%), Iran (17%), Romania (15%) and Sri Lanka (14%).

Cosmetics and OCT medicines (not to be confused with the pharmaceutical sector as an industry, tackled in the previous section) are particularly relevant in the United Kingdom (21%), Bangladesh (15%), Malaysia (13%) and Taiwan (10%). This

Share of turnover per client, consumer non-durables (%)



segment has remained relatively stable over the years, and while in the past it only covered cosmetics, it has historically hovered around 5% of global spending.

The largest segment, food, beverages, and confectionery, represented 7% of total spending in 2021. This represents a drop in share of up to 50% in the past 15 years. The question is whether the budgets of these clients have shrunk, whether the types of research they commission have remained largely the same or, perhaps most likely, whether they have developed their own in-house research departments and solutions and are increasingly internalising the insights function, as discussed in Chapter 3. This segment represented up to 14% of total spending in 2006, declined to 12% in 2011, and further to 10% in 2016 before settling at less than 7% in 2021.

8.3 Pro bono research

There are many reasons why a company may decide to offer a portion (or a totality) of its services for free. Newcomers to the industry may want to open up the market and create connections whereby they can build trust, companies may have programs of social research to help improve society, and others may release part of their research and their intelligence free of charge to serve the industry and/or build rapport.

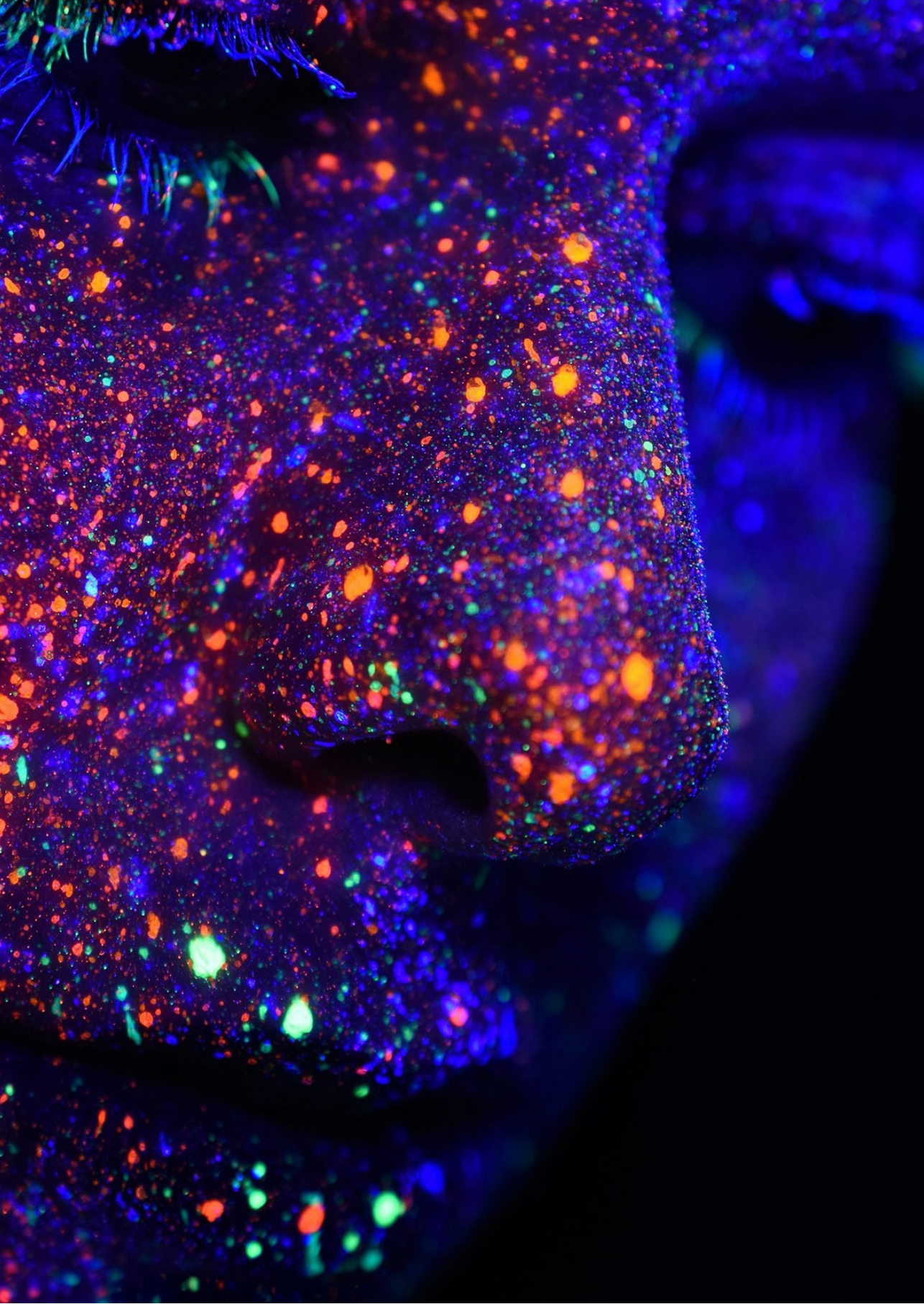
Pro bono research in 2021	US$ million	%
Australia	12.2	0.49%
Mexico	10.9	3.16%
Singapore	4.4	2.00%
United Kingdom	4.1	0.04%
Russia	2.4	0.70%
Italy	2.1	0.31%
Canada	1.4	0.18%
Austria	1.3	1.00%
Bangladesh	0.5	2.30%
Jamaica	0.3	5.00%
Pakistan	0.2	1.06%
Armenia	0.2	4.29%
Dem. Rep. Congo	0.1	4.50%
Guyana	0.03	1.18%

For those countries that track it, the levels of pro bono work conducted locally can vary substantially and may represent up to 5% of the total turnover in the country. In this report, up to 40 countries declared their estimated figures for pro bono research with a weighted average of 0.24%. Extrapolating this share to the total turnover declared in the world results in a potential pro bono level of activity of up to US$ 235 million globally!

While highly speculative, this level of activity would sit in the 20th position in the global ranking of countries in Chapter 9, table 9.2.7.

Up to 9 countries declared a level of pro bono research that represented more than 1% of the country's total turnover. Located in every region of the world, this result shows how widespread the practice is. Pro bono research is particularly popular in Jamaica, the Democratic Republic of the Congo, and Armenia, all above 4%. Mexico, Bangladesh and Singapore sit at levels above 2%, and Guyana, Pakistan and Austria at levels above 1%.

In monetary terms, however, Australia generates above US$ 12 million in pro bono insights, followed by Mexico with almost US$ 11 million, Singapore and the United Kingdom with levels above US$ 4 million, Russia and Italy with above US$ 2 million, and Canada and Austria above US$ 1 million.. ■



9. Survey data

Methodology

This study measures the global state of the insights industry at national, regional and global levels and covers work conducted by market research, data analytics and consulting companies or institutes. To avoid the double counting of international research turnover, work subcontracted to research companies outside the country is not included in the statistical analysis of the domestic research turnover.

The data

The data is provided by national market research associations, leading companies, independent analysts and ESOMAR representatives from around the world. Estimates have been validated by cross-checking between sources. However, due to a plurality of reasons, a country may not always be able to provide estimates on their industry either on time or at all. In these cases, GDP growth-derived estimates have been used to maintain the stability of the data and to allow like-for-like regional comparisons over time. These countries are included in the footnotes of tables 9.2.1 to 9.2.6. The market factors, which provide context for each country's development and trends, can be found in Chapter 1.

Data for the expanded definition of the industry was provided by ESOMAR's data provider Outsell and is presented in detail in table 9.1.5. This data supplements the information provided by all of the world's countries and serves to identify the amount of "undeclared" turnover of the industry that may otherwise remain hidden at regional and global levels. Countries were specifically asked which sector of the industry they included in their estimates: established, tech-enabled, reporting. The baseline assumption is that all countries include the established sector in their estimates, and only some include the technology-enabled and reporting ones. In the first case, the entire turnover was considered "established". In the second, the breakdowns of table 9.3.3 were utilised as appropriate.

Countries which covered only the tech-enabled sector besides the established one: Armenia, Brazil, Czech Republic, Iraq, Lebanon, Russia, Sri Lanka.

Countries which covered all three sectors: Argentina, Australia, Belgium, Canada, Finland, Guyana, India, Jamaica, Peru, Poland, Taiwan, Tunisia, United Kingdom, Uruguay, USA

Key changes

For this year's report, a number of modifications were made to both the mechanism of data collection (the survey questions) to better adapt to the definitions and terminology used and to the structure of this chapter and its tables. These details are as follows:

- As last year, the effective expansion of the definition of the industry allowed for the presentation of both the data declared by the world's countries and total estimated figures as provided by ESOMAR's data provider Outsell in all global and regional tables for turnover and growth (9.1.1 to 9.1.5).

- Estimates of growth include the expected net growth for the current year (after inflation and assuming a fixed exchange rate with respect to the current year) and calculates the resulting expected turnover for the country. Being forecasts, these figures will change in the next edition of the report as the data becomes factual.

- Tables 9.2.1 to 9.2.6 include footnotes to explain cases where an improvement in the reported data has led to changes with respect to those estimates published in previous editions of the report, as well as countries where GDP growth was utilised as a proxy for industry growth.

- Table 9.2.10 on the number of employees was re-examined last year to increase its informative value. A country's estimate of the number of employees in our sector can be divided into full- and part-timers and, from these, an approximate split is brought forward to segment the local workforce into three groups: market researchers, data analysts and consultants. ESOMAR acknowledges that these roles may overlap and asks the reader to exercise a degree of caution when assessing their shares.

- The lack of a concrete definition of ResearchTech (or ResTech) has forced the discontinuation of this data to avoid confusion among readers.

- The rise of self-service research platforms, particularly during the COVID-19 pandemic, demanded the inclusion of these types of tools on our tables. As it is impossible to determine which types of research designs are conducted with them – since that remains at the discretion of the end user – the category was added to table 9.3.6 as a separate category.

Calculations and presentation of figures

All trends and developments in this report are based on turnover in US dollars, whilst table 9.2.7 also shows turnover figures in Euros. Most countries reported their turnover in local currency, although some also submitted in US dollars. In those cases, countries were asked whether that was the currency they conducted business in, in which case turnover was not translated to their national currency (noted in table 9.5.2) or were asked to provide the exchange rate they used for conversion into the local rate, before being converted once again to US dollars using official sources. The average exchange rate provided by the International Monetary Fund (IMF) was used for the conversion of turnovers into US dollars and Euros for all markets. Growth rates are adjusted for inflation using the IMF's official rates (i.e. average annual changes). We have also adjusted the turnover for previous years where new data has become available for specific markets (noted in tables 9.2.1 through 9.2.6).

To eliminate the effect of exchange rate fluctuations, growth rates are calculated in the following way:

- Absolute and net growth rates per country are based on turnover in local currencies (where so instructed) translated to US dollars using the official 2020 exchange rate. The result is then compared to 2019 turnover in US dollars, also calculated with 2020 exchange rates (to remove the effects of changes in the exchange rates); whereas for the net growth rates, turnover has been further adjusted using the local inflation rates in 2019.

- For regional and global rates, the turnovers for 2019 and 2020 are obtained by aggregating the turnovers of each of their constituent countries either with their 2020 exchange rate or by factoring in inflation, as explained in the previous point.

- For expected turnover, countries are asked to provide their expected growth rate for 2021 after factoring in inflation. To allow for comparison with 2020 figures, no changes in the country's exchange rate are assumed. The resulting growth figure is then used to calculate the expected turnover for the country in 2021.

Please, note that the US dollar turnover figures for previous years in the tables of the chapter are not updated for the current year in each report. While adjustments on exchange rate fluctuations or inflation are incorporated for calculating the current absolute and net growth rates, the back data is not modified. As a consequence, the trended growth rates presented in this report may not be easily deduced from the offered data. The only case when previous data is modified is when a country provides improved figures to their official estimates for turnover.

Tables

Some questions in the survey were not answered by all countries, and those that did not answer certain questions have been excluded from the relevant tables. In numerous tables, weighted totals are presented on the proportion of turnover allocated to, e.g. different research methods or designs.

Turnover figures are used for weighting the data of each country that responded to a particular question. Some totals may not add up to 100% due to rounding.

9.1 Turnover, Growth and Historical Data

9.1.1 - Global market research turnover and growth rates per region

REGION	Turnover reported by all participant countries (US$m)					Expected turnover (US$m)	Absolute growth (%)	Net growth (%)	Expected net growth (%)
	2017	2018	2019	2020	2021	2022	2020/21	2020/21	2022
Europe EU 15+	14,371	14,972	16,897	15,975	18,826	20,922	11.4	8.6	4.5
New EU member states	696	726	704	657	759	850	11.9	7.3	2.3
Non-EU countries	897	866	871	1,056	1,118	1,187	6.6	1.6	-3.3
Total	**15,964**	**16,564**	**18,472**	**17,688**	**20,703**	**22,959**	**11.1**	**8.1**	**3.9**
North America	41,016	44,210	46,866	54,321	63,401	70,344	16.6	11.4	3.1
Asia Pacific	6,895	7,256	9,668	10,778	12,315	13,489	11.2	8.8	6.0
Latin America	1,584	1,484	1,416	1,073	1,189	1,374	12.8	4.4	5.1
Africa	473	500	482	384	456	533	14.7	1.3	3.0
Middle East	412	393	392	351	381	429	7.3	1.9	6.5
World	**66,345**	**70,407**	**77,296**	**84,594**	**98,445**	**109,127**	**14.6**	**10.2**	**3.6**

REGION	Turnover estimated by ESOMAR (US$m)					Expected turnover (US$m)	Absolute growth (%)	Net growth (%)	Expected net growth (%)
	2017	2018	2019	2020	2021	2022	2020/21	2020/21	2022
Europe	-	-	-	24,696	29,709	33,004	15.9	12.8	7.2
US	-	-	-	53,715	62,637	69,500	16.6	11.4	3.0
Asia Pacific	-	-	-	15,857	18,144	20,361	12.6	10.1	10.4
Rest of the Americas*	-	-	-	3,613	4,027	4,688	10.7	4.2	7.5
Africa & Middle East**	-	-	-	4,045	4,281	4,871	5.4	-3.8	3.5
World	**-**	**-**	**-**	**101,926**	**118,798**	**133,732**	**15.2**	**10.8**	**5.2**

+ This area includes the United Kingdom
** Please, note that this region is composed by Latin America plus Canada.*
*** Please, note that this label groups two regions: Africa and the Middle East.*
Some turnover figures have been updated since last year's publication.
Figures may not sum up due to rounding.
Expected turnover: Expected turnover is based on expected net growth (after factoring in inflation), and assumes linear exchange rate with respect to the current year.

9.1.2 - Global growth rate developments

	As reported by countries		As estimated by ESOMAR	
TIME PERIOD	Absolute growth (%)	Net growth (%)	Absolute growth (%)	Net growth (%)
2017 versus 2016	3.3	1.0	-	-
2018 versus 2017	2.1	-0.3	6.2	3.7
2019 versus 2018	5.9	3.9	7.6	5.6
2020 versus 2019	0.1	-1.3	1.7	0.3
2021 versus 2020	14.6	10.2	15.2	10.8
Expected 2022 versus 2021	10.9	3.6	12.6	5.2

The expected inflation rate for the world in 2022 is 6.964%

9.1.3 - Absolute growth rate (unadjusted for inflation) 2017-2022

REGION	Absolute growth rate of all participant countries (%)					Expected
	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22
Europe EU 15	1.3	0.0	0.7	-7.2	11.4	11.1
New EU member states	6.3	1.1	5.2	-5.7	11.9	12.0
Non-EU countries	5.5	1.8	5.0	-1.7	6.6	6.2
Total	**1.7**	**0.1**	**1.1**	**-6.9**	**11.1**	**10.9**
North America	3.7	2.5	8.1	3.7	16.6	11.0
Asia Pacific	4.3	5.6	4.6	-1.7	11.2	9.5
Latin America	7.0	2.5	2.0	-10.3	12.8	15.5
Africa	10.0	6.2	0.0	-14.4	14.7	16.9
Middle East	5.4	-4.3	1.8	-10.9	7.3	12.6
World	**3.3**	**2.1**	**5.9**	**0.1**	**14.6**	**10.9**

REGION	Absolute growth rate estimated by ESOMAR (%)					Expected
	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22
Europe total	-	-	5.2	1.8	15.9	14.4
US	-	-	6.1	3.8	16.6	11.0
Asia Pacific	-	-	8.1	2.4	12.6	14.1
Rest of the Americas	-	-	8.1	-19.2	10.7	16.4
Africa & Middle East	-	-	12.4	-4.4	5.4	13.8
World	**-**	**-**	**7.6**	**1.7**	**15.2**	**12.6**

Expected turnover: Expected turnover assumes linear exchange rate with respect to the current year.

9.1.4 - Net growth rate (adjusted for inflation) 2017-2022

REGION	Absolute growth rate of all participant countries (%)					Expected
	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22
Europe EU 15	-0.7	-2.1	-0.8	-7.8	8.6	4.5
New EU member states	4.2	-1.5	2.4	-8.0	7.3	2.3
Non-EU countries	1.2	-2.6	0.4	-4.8	1.6	-3.3
Total	**-0.4**	**-2.1**	**-0.6**	**-7.7**	**8.1**	**3.9**
North America	1.5	0.1	6.1	2.5	11.4	3.1
Asia Pacific	2.6	3.7	2.7	-4.0	8.8	6.0
Latin America	1.4	-2.7	-3.3	-14.4	4.4	5.1
Africa	1.4	-1.2	-6.5	-22.0	1.3	3.0
Middle East	2.9	-9.2	0.1	-13.7	1.9	6.5
World	**1.0**	**-0.3**	**3.9**	**-1.3**	**10.2**	**3.6**

REGION	Net growth rate estimated by ESOMAR (%)					Expected
	2016/17	2017/18	2018/19	2019/20	2020/21	2021/22
Europe total	-	-	3.4	1.0	12.8	7.2
US	-	-	4.2	2.5	11.4	3.0
Asia Pacific	-	-	2.5	0.0	10.1	10.4
Rest of the Americas	-	-	3.6	-21.9	4.2	7.5
Africa & Middle East	-	-	7.4	-10.4	-3.8	3.5
World	**-**	**-**	**5.6**	**0.3**	**10.8**	**5.2**

Expected turnover: Expected turnover is based on expected net growth (after factoring in inflation), and assumes linear exchange rate with respect to the current year.

** Please, note that the total turnover reported for 2021 indeed coincides with the total turnover reported by all countries: US$m 98,445. Some turnover figures have been updated since last year's publication. Figures may not sum up due to rounding. Please note that the segment "Others" is not included here. Therefore, totals may not coincide with the sum of the sectors.*
Please, refer to table 9.3.3 for a detailed breakdown of type of industry per country.

9.1.5 - Sectorial distribution of turnover among regions

REGION	Established research (US$m)				Absolute growth (%)	Net growth (%)	Expected net growth (%)
	2020	2021					
	Total	*Reported*	*Unreported*	Total	2020/21	2020/21	2021/22
Europe	11,171	*13,075*	*0*	13,075	12.2	9.2	3.9
US	19,019	*20,378*	*0*	20,378	7.1	2.3	-4.0
Asia Pacific	8,109	*9,265*	*0*	9,265	11.6	9.2	6.0
Rest of the Americas	1,499	*1,521*	*0*	1,521	0.2	-5.7	4.0
Africa & Middle East	1,891	*835*	*1,014*	1,849	-3.0	-11.4	0.2
World	**41,689**	**45,075**	**1,014**	**46,089**	**9.1**	**4.9**	**0.3**

REGION	Tech-enabled research (US$m)				Absolute growth (%)	Net growth (%)	Expected net growth (%)
	2020	2021					
	Total	*Reported*	*Unreported*	Total	2020/21	2020/21	2021/22
Europe	7,104	*4,150*	*4,484*	8,634	17.1	14.0	15.4
US	21,254	*27,664*	*0*	27,664	30.2	24.3	10.4
Asia Pacific	4,133	*2,019*	*2,662*	4,682	11.9	9.5	20.3
Rest of the Americas	1,578	*219*	*1,527*	1,746	10.4	3.9	10.6
Africa & Middle East	1,133	*0*	*1,249*	1,249	10.1	0.5	8.6
World	**35,203**	**34,053**	**9,922**	**43,975**	**23.7**	**18.9**	**12.5**

REGION	Reporting (US$m)				Absolute growth (%)	Net growth (%)	Expected net growth (%)
	2020	2021					
	Total	*Reported*	*Unreported*	Total	2020/21	2020/21	2021/22
Europe	6,257	*2,551*	*4,522*	7,073	10.1	7.1	3.6
US	13,441	*14,595*	*0*	14,595	8.6	3.7	-1.0
Asia Pacific	3,616	*883*	*3,166*	4,049	11.5	9.1	9.1
Rest of the Americas	536	*128*	*547*	675	25.8	18.4	8.0
Africa & Middle East	1,021	*0*	*1,182*	1,182	15.8	5.7	3.2
World	**24,871**	**18,157**	**9,416**	**27,574**	**9.7**	**5.5**	**2.0**

REGION	Total insights industry (US$m)				Absolute growth (%)	Net growth (%)	Expected net growth (%)
	2020	2021					
	Total	*Reported*	*Unreported*	Total	2020/21	2020/21	2021/22
Europe	24,696	*20,703*	*9,006*	29,709	15.9	12.8	7.2
US	53,715	*62,637*	*0*	62,637	16.6	11.4	3.0
Asia Pacific	15,857	*12,315*	*5,828*	18,144	12.6	10.1	10.4
Rest of the Americas	3,613	*1,954*	*2,073*	4,027	10.7	4.2	7.5
Africa & Middle East	4,045	*836*	*3,444*	4,281	5.4	-3.8	3.5
World	**101,926**	**98,445***	**20,352**	**118,798**	**15.2**	**10.8**	**5.2**

9.2 Regional and Country Data

9.2.1 - Europe turnover 2017-2022 and growth rates 2020-2022

EUROPE	Turnover (US$m)					Expected turnover (US$m)	Absolute growth (%)	Net growth (%)	Expected net growth (%)
	2017	2018	2019	2020	2021	2022	2020/21	2020/21	2021/22
EU 15									
United Kingdom*	6,498	6,783	9,355	9,109	11,075	12,490	13.4	10.5	5.0
France	2,362	2,475	2,424	2,123	2,395	2,592	8.8	6.6	4.0
Germany	2,766	2,788	2,302	2,111	2,316	2,492	5.8	2.5	2.0
Italy	622	685	640	586	691	771	13.7	11.6	6.0
Spain	571	606	584	555	617	681	7.2	4.0	4.8
Netherlands	474	508	443	399	474	514	14.7	11.5	3.0
Sweden	373	364	390	391	452	488	7.6	4.8	2.9
Belgium	142	152	167	147	174	197	13.7	10.2	5.0
Denmark	127	131	120	117	131	139	8.0	5.9	2.3
Austria	103	105	108	108	126	145	12.4	9.4	8.9
Portugal	91	99	99	89	102	112	9.8	8.8	6.1
Finland	86	112	104	93	100	106	3.4	1.3	2.0
Ireland	83	88	90	81	99	113	18.0	15.2	8.8
Greece	64	66	60	56	64	70	10.2	9.6	5.0
Luxembourg	8.3	9.1	9.1	9.1	10.4	11	10.6	6.9	1.8
EU 15 total	**14,371**	**14,972**	**16,897**	**15,975**	**18,826**	**20,922**	**11.4**	**8.6**	**4.5**
New EU member states									
Poland	178	190	178	170	190	214	10.9	5.5	3.7
Czech Republic	107	122	126	120	147	164	14.2	10.0	2.0
Romania	123	116	120	115	134	154	14.2	8.7	5.4
Bulgaria	70	79	80	70	81	87	11.2	8.1	-3.0
Hungary	107	101	79	63	73	84	12.6	7.1	3.7
Lithuania	23	27	27	28	30	35	4.6	0.0	1.8
Croatia	25	26	26	23	25	27	10.1	7.3	-0.5
Slovenia	17	18	18	18	21	21	12.6	10.5	-4.5
Estonia	15	17	17	17	20	22	13.2	8.4	0.2
Slovakia	19	19	17	17	19	21	5.9	3.0	2.6
Latvia	7.8	8.8	8.8	8.6	9.7	11	8.1	4.7	1.0
Cyprus	2.1	2.2	7.7	7.9	8.7	9.4	6.5	4.2	2.1
New EU member states total	**696**	**726**	**704**	**657**	**759**	**850**	**11.9**	**7.3**	**2.3**

Some turnover figures have been updated since last year's publication. Figures may not sum up due to rounding. Expected turnover: Expected turnover is based on expected net growth (after factoring in inflation), and assumes linear exchange rate with respect to the current year. Canada: Improved estimates explain the jump in turnover between 2017 and 2018. USA: Improved estimates explain the jump in turnover between 2019 and 2020. USA: Improved estimates explain the different turnover for 2020 provided for this year's report.

EUROPE	Turnover (US$m)					Expected turnover (US$m)	Absolute growth (%)	Net growth (%)	Expected net growth (%)
	2017	2018	2019	2020	2021	2022	2020/21	2020/21	2021/22
Non-EU countries									
Switzerland	202	179	168	417	409	399	-4.7	-5.3	-4.7
Russia	334	340	339	310	352	390	15.6	8.3	-8.5
Other European Countries	91	97	103	103	115	126	11.8	5.7	-0.1
Turkey	146	119	113	94	92	156	23.5	3.3	6.0
Norway	78	82	79	71	84	93	7.7	4.0	6.5
Ukraine	33	35	46	42	47	-	13.1	3.4	-
Iceland	9,0	9,3	8,0	6,9	8,2	9.0	10.2	5.5	3.3
Georgia	5,0	5,9	7,6	6,3	5,9	6.7	-2.6	-11.1	3.5
Armenia	5,1	5,2	5,6	3,8	4,2	4.6	9.4	2.0	2.0
Azerbaijan	2,5	2,6	2,8	2,2	2,5	2.9	12.7	5.6	2.8
Non-EU countries	**897**	**866**	**871**	**1,056**	**1,118**	**1,187**	**6.6**	**1.6**	**-3.3**
Total declared	**15,964**	**16,564**	**18,472**	**17,688**	**20,703**	**22,959**	**11.1**	**8.1**	**3.9**
Net growth (%)	**-0.4%**	**-2.1%**	**-0.6%**	**-7.7%**	**8.1%**	**3.9%**			
ESOMAR estimated undeclared	**-**	**-**	**-**	**7,008**	**9,006**	**11,017**	**-**	**-**	**-**
Total insights in Europe	**-**	**-**	**-**	**24,696**	**29,709**	**33,976**	**15.9**	**12.8**	**7.2**
Net growth (%)	**-**	**-**	**-**	**1.0%**	**12.8%**	**7.2%**			

Some turnover figures have been updated since last year's publication. Figures may not sum up due to rounding. Expected turnover: Expected turnover is based on expected net growth (after factoring in inflation), and assumes linear exchange rate with respect to the current year.
** This country is no longer part of the European Union.*
Other European Countries: Belarus, Bosnia-Herzegovina, North Macedonia, Moldova, Serbia and Montenegro. Armenia, Azerbaijan and Georgia have been transferred from APAC. Iceland: Please note that up until 2018, Iceland was included in the Other European Countries definition. United Kingdom: Improved estimates explain the jump in turnover between 2018 and 2019 (please, refer to Chapter 1 of the Global Market Research 2021 report for more information). Belgium, Denmark and Switzerland: Improved estimates explain the different turnover for 2020 provided for this year's report. GPD growth was used in absence of declared data to calculate the turnover of the following countries: Azerbaijan, Estonia, Hungary, Latvia, Luxembourg, Other European Countries, Slovakia, Sweden, Ukraine. Expected GDP growth was used for those countries did not provide expected 2022 growth: Cyprus, Denmark, Iceland, Lithuania, Netherlands, Poland, Russia, Spain.

9.2.2 - North America turnover 2017-2022 and growth rates 2020-2022

NORTH AMERICA	Turnover (US$m)					Expected turnover (US$m)	Absolute growth (%)	Net growth (%)	Expected net growth (%)
	2017	2018	2019	2020	2021	2022	2020/21	2020/21	2021/22
USA	40,672	43,573	46,245	53,715	62,637	69,472	16.6	11.4	3.0
Canada	344	637	621	606	765	872	18.0	14.1	8.0
Total declared	**41,016**	**44,210**	**46,866**	**54,321**	**63,401**	**70,344**	**16.6**	**11.4**	**3.1**
Net growth (%)	**1.5%**	**0.1%**	**6.1%**	**2.5%**	**11.4%**	**3.1%**			
ESOMAR estimated undeclared	**-**	**-**	**-**	**0**	**0**	**0**	**-**	**-**	**-**
Total insights	**-**	**-**	**-**	**54,321**	**63,401**	**70,344**	**16.6**	**11.4**	**3.1**
Net growth (%)	**-**	**-**	**-**	**2.5%**	**11.4%**	**3.1%**			

9.2.3 - Asia Pacific turnover 2017-2022 and growth rates 2020-2022

ASIA PACIFIC	Turnover (US$m)					Expected turnover (US$m)	Absolute growth (%)	Net growth (%)	Expected net growth (%)
	2017	2018	2019	2020	2021	2022	2020/21	2020/21	2021/22
China	2,071	2,358	2,780	2,931	3,347	3,245	6.7	5.8	-5.0
India	328	334	2,233	2,261	2,623	3,172	19.3	13.1	14.0
Australia	929	877	818	1,999	2,495	2,844	14.6	11.4	9.7
Japan	1,876	1,945	2,082	2,035	2,119	2,253	7.0	7.3	5.3
South Korea	483	510	500	479	537	638	8.7	6.1	14.3
Singapore	163	171	191	187	219	238	13.9	11.3	5.0
Thailand	171	183	190	155	169	189	10.1	8.8	8.0
Indonesia	131	119	124	113	134	154	16.6	14.8	11.0
Philippines	107	114	127	101	122	139	20.0	15.4	9.4
Hong Kong	147	151	139	98	107	125	10.5	8.7	13.7
Malaysia	122	120	116	95	100	109	4.4	1.9	5.6
Vietnam	96	100	99	90	98	107	7.1	5.2	5.1
Taiwan	97	100	96	91	91	93	-5.0	-6.7	0.0
New Zealand	88	86	86	72	85	104	8.9	4.8	15.2
Bangladesh	23	23	24	20	20	22	2.0	-3.4	6.4
Kazakhstan	21	22	21	15	18	21	21.8	12.8	10.0
Cambodia	9.4	10	11	8.4	8.7	9.4	5.2	2.2	5.1
Myanmar	15	18	18	13	7.0	8.1	-47.9	-49.7	1.0
Mongolia	2.4	2.6	3.9	4.3	6.1	7.2	43.4	33.9	2.5
Sri Lanka	8.7	8.8	7.5	5.4	5.5	6.5	10.0	3.8	0.0
Laos	5.0	4.3	3.0	2.5	2.0	2.1	-20.0	-22.9	0.0
South Pacific	-	-	-	1.8	2.0	2.1	11.1	8.6	0.9
Total declared	**6,895**	**7,256**	**9,668**	**10,778**	**12,315**	**13,489**	**11.2**	**8.8**	**6.0**
Net growth (%)	**2.6%**	**3.7%**	**2.7%**	**-4.0%**	**8.8%**	**6.0%**			
ESOMAR estimated undeclared	**-**	**-**	**-**	**5,079**	**5,828**	**7,208**	**-**	**-**	**-**
Total Insights in Asia Pacific	**-**	**-**	**-**	**15,857**	**18,144**	**20,697**	**12.6**	**10.1**	**10.4**
Net growth (%)	**-**	**-**	**-**	**0.0%**	**10.1%**	**10.4%**			

Some turnover figures have been updated since last year's publication. Figures may not sum up due to rounding. Expected turnover: Expected turnover is based on expected net growth (after factoring in inflation), and assumes linear exchange rate with respect to the current year. South Pacific: Cook Islands, Fiji, French Polynesia, Guam, Kiribati, Marshall Islands, Micronesia (Federated States of), Nauru, New Caledonia, Niue, Palau, Papua New Guinea, Samoa, Solomon Islands, Tonga, Tuvalu, Vanuatu. China: Improved estimates explain the jump in turnover between 2018 and 2019. India: Improved estimates explain the jump in turnover between 2018 and 2019 (please, refer to Chapter 1 of the Global Market Research report 2021 for more information). Australia, China, India, Indonesia, Malaysia, Singapore and South Korea: Improved estimates explain the different turnover for 2020 provided for this year's report. GPD growth was used in absence of declared data to calculate the turnover of the following countries: Cambodia. Expected GDP growth was used for those countries did not provide expected 2022 growth: Bangladesh, Malaysia and South Pacific.

9.2.4 Latin America turnover 2017-2022 and growth rates 2020-2022

LATIN AMERICA	Turnover (US$m)					Expected turnover (US$m)	Absolute growth (%)	Net growth (%)	Expected net growth (%)
	2017	2018	2019	2020	2021	2022	2020/21	2020/21	2021/22
Brazil	584	527	476	345	358	395	7.7	-0.5	2.0
Mexico	411	382	399	305	344	381	6.4	0.7	3.9
Colombia	150	151	148	117	143	169	23.6	19.4	10.0
Chile	112	117	103	79	96	112	16.0	11.0	9.0
Argentina	134	102	86	71	73	115	38.7	-6.5	4.0
Peru	77	88	86	60	64	79	18.4	13.9	16.0
Ecuador	34	35	34	32	33	35	4.4	4.2	2.9
Uruguay	15	15	15	11	11	12	5.6	-2.0	2.0
Dom. Republic	13	13	14	9.9	12	14	23.6	14.2	7.0
Guatemala	11	11	11	7.9	9.5	10	20.0	15.1	5.0
Caribbean	2.7	3.0	3.0	2.7	9.4	11	244.2	224.3	4.4
Jamaica	-	-	-	*0.7*	*6.0*	*6.6*	*800.0*	*749.9*	*0.0*
Guyana	*2.2*	*2.2*	*2.3*	*1.8*	*2.4*	*2.7*	*38.9*	*32.1*	*5.0*
Costa Rica	8.7	9.1	9.1	6.9	8.5	9.4	23.3	21.2	5.0
Bolivia	9.0	8.5	9.1	6.3	6.8	7.3	6.9	6.1	3.8
Panama	5.6	6.2	6.3	5.1	6.5	7.1	28.3	26.3	5.0
Paraguay	6.5	6.9	6.6	6.1	6.5	7.2	9.2	4.2	0.3
El Salvador	5.0	5.0	4.9	3.7	4.6	4.9	23.1	19.0	3.0
Honduras	3.4	3.9	3.9	2.9	3.5	3.8	19.4	14.2	3.0
Nicaragua	3.0	2.7	2.2	1.4	1.0	1.1	-29.3	-32.6	0.0
Total declared	**1,584**	**1,484**	**1,416**	**1,073**	**1,189**	**1,374**	**12.8**	**4.4**	**5.1**
Net growth (%)	**1.4%**	**-2.7%**	**-3.3%**	**-14.4%**	**4.4%**	**5.1%**			
ESOMAR estimated undeclared	**-**	**-**	**-**	**1,935**	**2,073**	**2,441**	**-**	**-**	**-**
Total insights in Latin America + Canada	**-**	**-**	**-**	**3,613**	**4,027**	**4,688**	**10.7**	**4.2**	**7.5**
Net growth (%)	**-**	**-**	**-**	**-21.9%**	**4.2%**	**7.5%**			

Some turnover figures have been updated since last year's publication. Figures may not sum up due to rounding. Expected turnover: Expected turnover is based on expected net growth (after factoring in inflation), and assumes linear exchange rate with respect to the current year. Caribbean: The Bahamas, Trinidad and Tobago, Jamaica, Suriname and Guyana. Colombia: Improved estimates explain the different turnover for 2020 provided for this year's report.GPD growth was used in absence of declared data to calculate the turnover of the following countries: Bolivia, Ecuador, Paraguay.

9.2.5 - Africa turnover 2017-2022 and growth rates 2020-2022

AFRICA	Turnover (US$m)					Expected turnover (US$m)	Absolute growth (%)	Net growth (%)	Expected net growth (%)
	2017	2018	2019	2020	2021	2022	2020/21	2020/21	2021/22
South Africa	221	237	202	175	214	231	9.7	4.9	1.9
Sadec	33	41	47	48	56	68	15.7	-1.2	3.1
Mozambique	*0.6*	*1.5*	*1.5*	*0.8*	*0.5*	*0.6*	*-34.5*	*-38.0*	*3.8*
Nigeria	113	104	109	57	54	65	6.5	-8.9	3.0
East Africa	19	21	24	28	48	75	70.4	-5.4	4.1
Sudan	*1.8*	*0.6*	*1.4*	*0.6*	*0.6*	*1.9*	*155.7*	*-44.3*	*0.3*
Maghreb	22	23	24	24	25	28	7.1	2.2	2.3
Algeria	-	-	*8.4*	*7.8*	*8.2*	*9.1*	*11.5*	*4.0*	*2.4*
Tunisia	*7.4*	*5.1*	*6.1*	*6.2*	*5.4*	*6.1*	*-13.5*	*-18.2*	*5.0*
Kenya	38	39	35	22	24	27	13.8	7.2	5.7
West Africa	18	20	21	21	23	26	10.4	5.0	5.1
Ghana	-	*17*	*16*	*13*	*14*	*17*	*14.6*	*4.2*	*5.2*
South Sudan	-	-	5.0	2.5	3.5	4.3	40.0	32.9	6.5
Somalia	4.3	4.7	5.0	2.5	3.5	3.9	40.0	33.8	3.0
Dem. Rep. Congo	3.9	6.0	6.0	3.4	3.0	3.5	-10.0	-17.4	10.0
Zimbabwe	-	3.1	2.7	0.3	0.3	0.6	111.1	6.3	3.5
Total declared	**473**	**500**	**482**	**384**	**456**	**533**	**14.7**	**1.3**	**3.0**
Net growth (%)	**1.4%**	**-1.2%**	**-6.5%**	**-22.0%**	**1.3%**	**3.0%**			
ESOMAR estimated undeclared	**-**	**-**	**-**	**3,310**	**3,444**	**3,909**	**-**	**-**	**-**
Total insights in Africa and Middle East	**-**	**-**	**-**	**4,045**	**4,281**	**4,871**	**5.4**	**-3.8**	**3.5**
Net growth (%)	**-**	**-**	**-**	**-10.4%**	**-3.8%**	**3.5%**			

Some turnover figures have been updated since last year's publication. Figures may not sum up due to rounding. Expected turnover: Expected turnover is based on expected net growth (after factoring in inflation), and assumes linear exchange rate with respect to the current year. Maghreb: Algeria, Morocco, Tunisia. Sadec: Angola, Botswana, Lesotho, Malawi, Mozambique, Namibia, Eswatini, Zambia. East Africa: Sudan, Tanzania, Uganda, Rwanda and Burundi. West Africa: Ivory Coast, Senegal, Cameroon, Ghana, Benin, Togo and Mali. Somalia: Identification of activity carried out in the country that did not contribute to the national industry explain the jump in turnover between 2019 and 2020. GPD growth was used in absence of declared data to calculate the turnover of the following countries: Algeria, Ghana, Kenya, Other East Africa, Sadec, South Africa, West Africa, Zimbabwe. Expected GDP growth was used for those countries did not provide expected 2022 growth: Mozambique, Somalia, South Sudan and Sudan.

9.2.6 - Middle East turnover 2017-2022 and growth rates on 2020-2022

MIDDLE EAST	Turnover (US$m)					Expected turnover (US$m)	Absolute growth (%)	Net growth (%)	Expected net growth (%)
	2017	2018	2019	2020	2021	2022	2020/21	2020/21	2021/22
GCC	240	245	246	236	248	271	4.8	2.6	6.2
Saudi Arabia	35	35	36	35	37	41	6.4	3.2	7.6
Israel	66	68	71	49	58	63	9.8	8.2	5.0
Egypt	26	22	24	24	27	34	10.0	5.3	18.0
Pakistan	34	34	25	19	19	21	-1.0	-9.1	-0.4
Levant	9.9	11	11	10	15	20	38.9	-15.8	10.2
Lebanon	7.8	8.5	7.9	3.5	4.5	11	28.1	-60.5	25.0
Iran	32	8.4	11	8.1	11	14	28.9	-8.0	0.0
Iraq	4.0	4.5	4.7	4.2	5.0	5.9	19.4	12.6	9.5
Total declared	**412**	**393**	**392**	**351**	**381**	**429**	**7.3**	**1.9**	**6.5**
Net growth (%)	**2.9%**	**-9.2%**	**0.1%**	**-13.7%**	**1.9%**	**6.5%**			

Some turnover figures have been updated since last year's publication. Figures may not sum up due to rounding. Expected turnover: Expected turnover is based on expected net growth (after factoring in inflation), and assumes linear exchange rate with respect to the current year. GCC: Bahrain, Kuwait, Oman, Qatar, Saudi Arabia, United Arab Emirates Levant: Jordan, Lebanon and Syria. GPD growth was used in absence of declared data to calculate the turnover of the following countries: GCC, Saudi Arabia, Israel, Levant. Expected GDP growth was used for those countries did not provide expected 2022 growth: Iraq

9.2.7 - Countries ranked by market size

COUNTRY		Turnover in US$ million					Turnover in EUR million				
		2017	2018	2019	2020	2021	2017	2018	2019	2020	2021
1 (=)	USA	40,672	43,573	46,245	53,715	62,637	36,020	36,881	41,176	47,065	52,924
2 (=)	United Kingdom	6,498	6,783	9,355	9,109	11,075	5,755	5,741	8,330	7,981	9,357
3 (=)	China	2,071	2,358	2,780	2,931	3,347	1,834	1,996	2,475	2,568	2,828
4 (=)	India	328	334	2,233	2,261	2,623	291	282	1,988	1,981	2,216
5 (+3)	Australia	929	877	818	1,999	2,495	823	742	728	1,752	2,108
6 (-1)	France	2,362	2,475	2,424	2,123	2,395	2,091	2,095	2,158	1,860	2,023
7 (-1)	Germany	2,766	2,788	2,302	2,111	2,316	2,450	2,360	2,050	1,850	1,957
8 (-1)	Japan	1,876	1,945	2,082	2,035	2,119	1,661	1,646	1,854	1,783	1,791
9 (=)	Canada	344	637	621	606	765	304	539	553	531	646
10 (=)	Italy	622	685	640	586	691	551	580	570	513	584
11 (=)	Spain	571	606	584	555	617	506	513	520	486	521
12 (=)	South Korea	483	510	500	479	537	428	432	445	420	454
13 (=)	Netherlands	474	508	443	399	474	420	430	395	350	401
14 (=)	Sweden	373	364	390	391	452	331	308	347	343	382
15 (+6)	Switzerland	202	179	168	417	409	179	152	149	366	345
16 (-1)	Brazil	584	527	476	345	358	517	446	424	303	302
17 (-1)	Russia	334	340	339	310	352	295	288	302	271	297
18 (-1)	Mexico	411	382	399	305	344	364	323	356	267	290
19 (-1)	GCC	240	245	246	236	248	213	207	219	207	209
20 (-1)	Singapore	163	171	191	187	219	144	144	170	164	185
21 (-1)	South Africa	221	237	202	175	214	196	201	180	154	181
22 (=)	Poland	178	190	178	170	190	157	161	159	149	160
23 (+1)	Belgium	142	152	167	147	174	126	129	149	129	147
24 (-1)	Thailand	171	183	190	155	169	152	155	169	136	143
25 (=)	Czech Republic	107	122	126	120	147	95	103	113	106	124
26 (+2)	Colombia	150	151	148	117	143	133	128	132	103	121
27 (+2)	Indonesia	131	119	124	113	134	116	101	111	99	113
28 (-1)	Romania	123	116	120	115	134	109	99	106	101	113
29 (-3)	Denmark	127	131	120	117	131	113	111	107	102	111
30 (=)	Austria	103	105	108	108	126	92	89	96	94	106
31 (+1)	Philippines	107	114	127	101	122	95	97	113	88	103
32 (-1)	Other European Countries	91	97	103	103	115	80	82	91	90	97
33 (+1)	Hong Kong	147	151	139	98	107	130	128	124	85	91
34 (+5)	Portugal	91	99	99	89	102	81	83	89	78	86
35 (-2)	Malaysia	122	120	116	95	100	108	102	103	83	85
36 (=)	Finland	86	112	104	93	100	76	95	93	82	85
37 (+3)	Ireland	83	88	90	81	99	73	75	80	71	83
38 (=)	Vietnam	96	100	99	90	98	85	84	88	79	83
39 (+2)	Chile	112	117	103	79	96	99	99	92	69	81
40 (-5)	Turkey	146	119	113	94	92	129	101	100	82	77
41 (-4)	Taiwan	97	100	96	91	91	86	85	86	80	77
42 (=)	New Zealand	88	86	86	72	85	78	73	77	63	72
43 (=)	Norway	78	82	79	71	84	69	70	70	63	71
44 (+1)	Bulgaria	70	79	80	70	81	62	67	71	62	68
45 (+1)	Hungary	107	101	79	63	73	95	85	70	55	62
46 (-2)	Argentina	134	102	86	71	73	119	86	76	62	62
47 (=)	Peru	77	88	86	60	64	68	74	76	53	54
48 (+1)	Greece	64	66	60	56	64	57	56	54	49	54
49 (+1)	Israel	66	68	71	49	58	58	58	63	43	49
50 (+1)	Sadec	33	41	47	48	56	29	35	41	42	47

COUNTRY		Turnover in US$ million					Turnover in EUR million				
		2017	2018	2019	2020	2021	2017	2018	2019	2020	2021
51 (-3)	Nigeria	113	104	109	57	54	100	88	97	50	46
52 (+3)	East Africa	19	21	24	28	48	17	18	21	25	41
53 (-1)	Ukraine	33	35	46	42	47	29	29	41	36	39
54 (-1)	Saudi Arabia	35	35	36	35	37	31	30	32	31	32
55 (-1)	Ecuador	34	35	34	32	33	30	29	31	28	28
56 (=)	Lithuania	23	27	27	28	30	21	23	24	24	25
57 (=)	Egypt	26	22	24	24	27	23	18	21	21	23
58 (+1)	Croatia	25	26	26	23	25	22	22	23	20	21
59 (-1)	Maghreb	22	23	24	24	25	20	19	22	21	21
60 (=)	Kenya	38	39	35	22	24	34	33	32	19	20
61 (=)	West Africa	18	20	21	21	23	16	17	19	18	20
62 (+2)	Slovenia	17	18	18	18	21	15	15	16	16	18
63 (-1)	Bangladesh	23	23	24	20	20	20	20	21	17	17
64 (+2)	Estonia	15	17	17	17	20	13	14	15	15	17
65 (=)	Slovakia	19	19	17	17	19	17	16	15	15	16
66 (-3)	Pakistan	34	34	25	19	19	30	29	22	16	16
67 (=)	Kazakhstan	21	22	21	15	18	18	19	19	13	15
68 (+3)	Levant	9.9	11	11	10	15	8.8	9.1	9.7	9.2	12
69 (=)	Ghana	-	17	16	13	14	-	14	14	11	12
70 (+2)	Dom. Republic	13	13	14	9.9	12	12	11	12	8.7	10
71 (-1)	Uruguay	15	15	15	11	11	13	12	13	9.7	9.1
72 (+4)	Iran	32	8.4	11	8.1	11	29	7.1	9.7	7.1	8.9
73 (=)	Luxembourg	8.3	9.1	9.1	9.1	10	7.3	7.7	8.1	7.9	8.8
74 (=)	Latvia	7.8	8.8	8.8	8.6	9.7	6.9	7.4	7.9	7.6	8.2
75 (+2)	Guatemala	11	11	11	7.9	9.5	9.4	9.1	9.7	6.9	8.0
76 (+19)	Caribbean	2.7	3.0	3.0	2.7	9.4	2.4	2.6	2.7	2.4	8.0
77 (-2)	Cambodia	9.4	10	11	8.4	8.7	8.3	8.7	10.0	7.3	7.4
78 (=)	Cyprus	2.1	2.2	7.7	7.9	8.7	1.8	1.9	6.9	6.9	7.4
79 (+2)	Costa Rica	8.7	9.1	9.1	6.9	8.5	7.7	7.7	8.1	6.0	7.1
80 (-1)	Algeria	-	-	8.4	7.8	8.2	-	-	7.5	6.8	6.9
81 (-1)	Iceland	9.0	9.3	8.0	6.9	8.2	8.0	7.9	7.1	6.1	6.9
82 (-14)	Myanmar	15	18	18	13	7.0	13	15	16	12	5.9
83 (-1)	Bolivia	9.0	8.5	9.1	6.3	6.8	8.0	7.2	8.1	5.6	5.7
84 (+3)	Panama	5.6	6.2	6.3	5.1	6.5	5.0	5.2	5.6	4.5	5.5
85 (=)	Paraguay	6.5	6.9	6.6	6.1	6.5	5.8	5.8	5.9	5.3	5.5
86 (+2)	Mongolia	2.4	2.6	3.9	4.3	6.1	2.1	2.2	3.4	3.8	5.1
87 (New)	Jamaica	-	-	-	0.7	6.0	-	-	-	0.6	5.1
88 (-5)	Georgia	5.0	5.9	7.6	6.3	5.9	4.5	5.0	6.8	5.5	5.0
89 (-3)	Sri Lanka	8.7	8.8	7.5	5.4	5.5	7.7	7.5	6.6	4.7	4.7
90 (-6)	Tunisia	7.4	5.1	6.1	6.2	5.4	6.6	4.3	5.4	5.4	4.5
91 (-2)	Iraq	4.0	4.5	4.7	4.2	5.0	3.5	3.8	4.1	3.7	4.2
92 (-1)	El Salvador	5.0	5.0	4.9	3.7	4.6	4.4	4.3	4.3	3.2	3.9
93 (-1)	Lebanon	7.8	8.5	7.9	3.5	4.5	6.9	7.2	7.0	3.1	3.8
94 (-4)	Armenia	5.1	5.2	5.6	3.8	4.2	4.5	4.4	5.0	3.4	3.5
95 (-1)	Honduras	3.4	3.9	3.9	2.9	3.5	3.0	3.3	3.5	2.6	3.0
96 (=)	Somalia	4.3	4.7	5.0	2.5	3.5	3.8	3.9	4.5	2.2	3.0
97 (+1)	South Sudan	-	-	5.0	2.5	3.5	-	-	4.5	2.2	3.0
98 (-5)	Dem. Rep. Congo	3.9	6.0	6.0	3.4	3.0	3.5	5.1	5.4	2.9	2.6
99 (=)	Azerbaijan	2.5	2.6	2.8	2.2	2.5	2.3	2.2	2.5	2.0	2.1
100 (=)	Guyana	2.2	2.2	2.3	1.8	2.4	1.9	1.9	2.0	1.5	2.1
101 (New)	South Pacific	-	-	-	1.8	2.0	-	-	-	1.6	1.7
102 (-5)	Laos	5.0	4.3	3.0	2.5	2.0	4.4	3.6	2.7	2.2	1.7
103 (-2)	Nicaragua	3.0	2.7	2.2	1.4	1.0	2.6	2.3	2.0	1.2	0.8
104 (-1)	Sudan	1.8	0.6	1.4	0.6	0.6	1.6	0.5	1.3	0.5	0.5
105 (-3)	Mozambique	0.6	1.5	1.5	0.8	0.5	0.5	1.3	1.4	0.7	0.4
106 (-2)	Zimbabwe	-	3.1	2.7	0.3	0.3	-	2.7	2.4	0.2	0.3

Some turnover figures have been updated since last year's publication.

9.2.8 - International subcontracting 2021

COUNTRY	Total Turnover (US$m)	Subcontracted outside the country (US$m)	Subcontracted outside the country (%)	Turnover within the country (US$m)	Turnover within the country (%)
Argentina	81	8.1	10	73	90
Armenia	5.6	1.4	25	4.2	75
Australia	2,504	9.5	0.4	2,495	99.6
Austria	148	22	15	126	85
Bangladesh	20	0.1	0.4	20	99.7
Brazil	398	40	10	358	90
Bulgaria	93	12	13	81	87
Canada	765	0	0	765	100
Chile	96	0	0	96	100
China	3,475	128	3.7	3,347	96.3
Colombia	146	2.9	2.0	143	98
Costa Rica	9.4	0.9	10	8.5	90
Croatia	26	0.2	1.0	25	99
Cyprus	8.7	0	0	8.7	100
Czech Republic	164	16	10	147	90
Dem. Rep. Congo	3.9	0.9	22	3.0	78
Denmark	196	64	33	131	67
Dominican Republic	14	1.4	10	12.2	90
Egypt	31	4.4	14	27	86
El Salvador	4.8	0.2	5.0	4.6	95
Finland	125	25	20	100	80
France	2,548	153	6.0	2,395	94
Georgia	6.7	0.8	13	5.9	87.5
Greece	64	0	0	64	100
Guatemala	10.0	0.5	5.0	9.5	95
Guyana	4.1	1.6	40	2.4	60
Honduras	3.7	0.2	5.0	3.5	95
Hong Kong	118	10	8.8	107	91.2
Iceland	8.2	0	0	8.2	100
India	2,657	35	1.3	2,623	98.7
Indonesia	136	1.2	0.9	134	99.1
Iran	10.7	0.2	2.0	10.5	98
Iraq	5.0	0	0	5.0	100
Ireland	101	2.2	2.2	99	97.8
Italy	715	24	3.4	691	96.6
Jamaica	6.7	0.7	10	6.0	90
Japan	2,148	28	1.3	2,119	98.7
Kazakhstan	18	0	0	18	100
Lebanon	6.5	2.0	31	4.5	69
Lithuania	38	7.5	20	30	80
Malaysia	103	2.6	2.6	100	97.5
Mexico	354	10	2.9	344	97.1
Mongolia	6.1	0	0	6.1	100

COUNTRY	Total Turnover (US$m)	Subcontracted outside the country (US$m)	Subcontracted outside the country (%)	Turnover within the country (US$m)	Turnover within the country (%)
Mozambique	0.5	0	0	0.5	100
Myanmar	7.0	0	0	7.0	100
Netherlands	528	53	10	474	90
New Zealand	100	15	15	85	85
Nicaragua	1.1	0.1	10	1.0	90
Nigeria	61	6.1	10	54	90
Norway	84	0	0	84	100
Pakistan	19	0.1	0.8	19	99.3
Panama	7.7	1.2	15	6.5	85
Peru	70	5.6	8.0	64	92
Philippines	122	0.1	0	122	100
Poland	197	7.0	3.6	190	96.4
Portugal	103	1.5	1.5	102	98.5
Romania	136	2.3	1.7	134	98.3
Russia	364	13	3.5	352	96.5
Singapore	365	146	40	219	60
Slovenia	22	0.9	4.0	21	96
Somalia	3.5	0	0	3.5	100
South Korea	573	36	6.3	537	93.7
South Pacific	2.0	0	0	2.0	100
South Sudan	3.5	0	0	3.5	100
Spain	677	60	8.8	617	91.2
Sri Lanka	6.0	0.4	7.0	5.5	93
Sudan	0.6	0	0	0.6	100
Switzerland	470	62	13	409	87
Taiwan	96	4.8	5.0	91	95
Thailand	173	3.6	2.1	169	97.9
Tunisia	5.4	0	0	5.4	100
Turkey	104	13	12	92	87.8
United Kingdom	11,075	0	0	11,075	100
Uruguay	11	0.4	3.2	11	96.8
USA	62,637	0	0	62,637	100
Vietnam	101	2.9	2.9	98	97.1

A share of 0% of subcontracted services outside the country was used for those cases in which the country did not provide data, or where the share was not known. Turnover within the country is used in the turnover, growth and per capita data tables to avoid double counting of international turnover. Not all countries provided data. Figures may not sum up due to rounding.

9.2.9 Market research and advertising spend per capita

COUNTRY	MR turnover in 2021 (US$m)	Adspend* in 2021 (US$m)	Population** in 2021 (m)	MR spend per capita (US$)	Ad spend per capita (US$)	MR as % of ad spend
Algeria	8.2	291	44	0.18	6.54	2.8%
Argentina	73	905	46	1.59	19.73	8.1%
Armenia	4.2	na	3.0	1.41	na	na
Australia	2,495	15,066	26	97.03	586.01	16.6%
Austria	126	5,778	8.9	14.05	645.90	2.2%
Azerbaijan	2.5	na	10	0.25	na	na
Bangladesh	20	334	166	0.12	2.01	6.0%
Belgium	174	2,863	12	15.04	247.52	6.1%
Bolivia	6.8	na	12	0.58	na	na
Brazil	358	11,986	213	1.68	56.38	3.0%
Bulgaria	81	967	6.9	11.79	140.70	8.4%
Cambodia	8.7	na	16	0.55	na	na
Canada	765	13,499	38	20.01	353.15	5.7%
Caribbean	9	na	6	1.59	na	na
Chile	96	1,111	20	4.84	56.34	8.6%
China	3,347	118,031	1,413	2.37	83.56	2.8%
Colombia	143	794	51	2.80	15.55	18.0%
Costa Rica	8.5	281	5.2	1.63	54.20	3.0%
Croatia	25	255	4.0	6.30	63.16	10.0%
Cyprus	8.7	64	0.9	9.71	71.49	13.6%
Czech Republic	147	2,307	11	13.76	215.61	6.4%
Dem. Rep. Congo	3.0	na	94	0.03	na	na
Denmark	131	2,252	5.8	22.47	385.54	5.8%
Dominican Republic	12.2	na	11	1.16	na	na
East Africa	48	na	173	0.28	na	na
Ecuador	33	291	18	1.87	16.41	11.4%
Egypt	27	384	103	0.26	3.74	7.0%
El Salvador	4.6	na	6.5	0.70	na	na
Estonia	20	107	1.3	14.86	80.16	18.5%
Finland	100	1,597	5.5	18.08	288.54	6.3%
France	2,395	18,546	65	36.59	283.38	12.9%
GCC	248	na	58	4.24	na	na
Georgia	5.9	42	3.7	1.58	11.22	14.1%
Germany	2,316	28,158	83	27.84	338.45	8.2%
Ghana	14	133	31	0.45	4.26	10.5%
Greece	64	1,183	11	5.98	110.77	5.4%
Guatemala	9.5	177	18	0.52	9.67	5.3%
Guyana	2.4	na	0.8	3.10	na	na
Honduras	3.5	198	10.1	0.35	19.61	1.8%
Hong Kong	107	2,457	7.4	14.52	331.89	4.4%
Hungary	73	1,013	9.7	7.53	104.05	7.2%
Iceland	8.2	na	0.4	22.09	na	na
India	2,623	9,821	1,392	1.88	7.06	26.7%
Indonesia	134	7,237	272	0.49	26.58	1.9%
Iran	10.5	na	85	0.12	na	na
Iraq	5.0	na	41	0.12	na	na
Ireland	99	1,891	5.0	19.58	375.23	5.2%
Israel	58	1,186	9.4	6.17	126.61	4.9%
Italy	691	10,812	59	11.67	182.52	6.4%
Jamaica	6.0	na	2.7	2.21	na	na
Japan	2,119	44,701	126	16.88	356.16	4.7%
Kazakhstan	18	472	19	0.93	24.70	3.8%

COUNTRY	MR turnover in 2021 (US$m)	Adspend* in 2021 (US$m)	Population** in 2021 (m)	MR spend per capita (US$)	Ad spend per capita (US$)	MR as % of ad spend
Kenya	24	1,133	50	0.49	22.76	2.1%
Laos	2.0	na	7.4	0.27	na	na
Latvia	9.7	93	1.9	5.12	49.15	10.4%
Lebanon	4.5	1,135	6.8	0.66	166.35	0.4%
Levant	15	na	17	0.85	na	na
Lithuania	30	138	2.8	10.78	49.57	21.8%
Luxembourg	10.4	150	0.6	16.35	236.07	6.9%
Maghreb	25	na	93	0.27	na	na
Malaysia	100	1,250	33	3.06	38.24	8.0%
Mexico	344	4,748	129	2.66	36.81	7.2%
Mongolia	6.1	na	3.4	1.78	na	na
Mozambique	0.5	35	32	0.02	1.09	1.4%
Myanmar	7.0	na	54	0.13	na	na
Netherlands	474	5,334	17	27.15	305.26	8.9%
New Zealand	85	2,222	5.1	16.66	434.34	3.8%
Nicaragua	1.0	75	6.5	0.15	11.48	1.3%
Nigeria	54	202	211	0.26	0.96	26.9%
Norway	84	2,275	5.4	15.56	420.05	3.7%
Other Eur. Countries	115	na	25	4.60	na	na
Pakistan	19	291	223	0.08	1.31	6.4%
Panama	6.5	694	4.3	1.51	160.04	0.9%
Paraguay	6.5	140	7.4	0.89	18.99	4.7%
Peru	64	544	34	1.90	16.07	11.8%
Philippines	122	4,519	110	1.10	41.01	2.7%
Poland	190	3,146	38	5.02	83.14	6.0%
Portugal	102	695	10	9.85	67.39	14.6%
Romania	134	546	19	6.93	28.28	24.5%
Russia	352	9,568	146	2.42	65.73	3.7%
Sadec	56	na	113	0.49	na	na
Saudi Arabia	37	1,272	35	1.06	35.88	2.9%
Singapore	219	1,060	5.5	40.12	194.38	20.6%
Slovakia	19	913	5.5	3.50	167.23	2.1%
Slovenia	21	365	2.1	9.94	173.03	5.7%
Somalia	4	na	16	0.21	na	na
South Africa	214	3,260	60	3.56	54.20	6.6%
South Korea	537	14,210	52	10.39	274.95	3.8%
South Pacific	2	na	11	0.18	na	na
South Sudan	3.5	na	14	0.25	na	na
Spain	617	8,604	47	13.02	181.52	7.2%
Sri Lanka	5.5	182	22	0.25	8.26	3.0%
Sudan	0.6	na	45	0.01	na	na
Sweden	452	4,381	10	43.25	419.16	10.3%
Switzerland	409	4,611	8.7	47.12	531.83	8.9%
Taiwan	91	3,356	23	3.91	143.57	2.7%
Thailand	169	3,297	70	2.42	47.13	5.1%
Tunisia	5.4	57	12	0.45	4.75	9.4%
Turkey	92	2,215	85	1.08	26.15	4.1%
Ukraine	47	1,609	41	1.13	39.17	2.9%
United Kingdom	11,075	42,421	68	163.99	628.17	26.1%
Uruguay	11	378	3.5	3.03	106.60	2.8%
USA	62,637	270,769	332	188.56	815.12	23.1%
Vietnam	98	2,067	98	1.00	21.02	4.7%
West Africa	23	na	145	0.16	na	na
Zimbabwe	0.3	na	15	0.02	na	na

* Source: WARC
** Source: IMF

9.2.10 - Insights industry employees

COUNTRY	Full time employees				Part time employees			
	# Full-time	Researchers (%)	Data analysts (%)	Consultants (%)	# Part time	Researchers (%)	Data analysts (%)	Consultants (%)
Argentina	850	-	-	-	40	-	-	-
Armenia	55	70	10	20	300	80	5	15
Australia	10,609	-	-	-	3,564	-	-	-
Brazil	6,366	94	5	1	-	-	-	-
Bulgaria	2,250	87	10	3	130	80	10	10
Canada	5,033	-	-	-	3,030	-	-	-
Chile	665	-	-	-	3,092	-	-	-
Costa Rica	180	70	20	10	260	50	30	20
Croatia	400	62	22	16	133	77	23	0
Czech Republic	1,350	-	-	-	500	-	-	-
Dominican Republic	280	80	10	10	240	70	20	10
El Salvador	10	70	20	10	60	60	20	20
France	10,100	-	-	-	-	-	-	-
Georgia	341	63	20	17	884	35	10	55
Germany	9,300	-	-	-	2,500	-	-	-
Guatemala	150	50	20	30	170	25	40	35
Guyana	40	-	40	60	700	70	25	5
Honduras	120	70	20	10	90	60	30	10
Hong Kong	739	92	6	2	307	79	-	21
India	123,000	-	-	-	35,000	-	-	-
Indonesia	2,000	73	17	10	12,000	85	5	10
Iran	300	60	25	15	-	-	-	-
Ireland	446	88	11	1	270	71	-	29
Italy	2,710	52	23	25	487	35	20	45
Jamaica	100	70	30	0	2,000	90	-	10
Japan	8,000	-	-	-	3,000	-	-	-
Kazakhstan	300	80	15	5	50	90	-	10
Lebanon	150	-	-	-	70	-	-	-
Mexico	4,610	55	26	19	3,162	68	11	21
Mongolia	120	-	-	-	300	-	-	-
New Zealand	760	60	30	10	149	66	15	19
Nicaragua	30	60	20	20	10	50	40	10
Nigeria	650	5	10	90	2,100	80	3	5

Resulting Total				
# Resulting Total	Researchers (%)	Data analysts (%)	Consultants (%)	Expectation of employee change in 2022
890	-	-	-	I don't know
355	78	6	16	Increase
14,173	-	-	-	Increase
6,366	-	-	-	Increase
2,380	87	10	3	Remain
8,063	-	-	-	Increase
3,757	-	-	-	Remain
440	58	26	16	Increase
533	66	22	12	Remain
1,850	-	-	-	Remain
520	75	15	10	Increase
70	61	20	19	Increase
10,100	-	-	-	Increase
1,225	43	13	44	Remain
11,800	-	-	-	Increase
320	37	31	33	Increase
740	66	26	8	Increase
210	66	24	10	Increase
1,046	88	4	8	Increase
158,000	-	-	-	Increase
14,000	83	7	10	Remain
300	-	-	-	Remain
716	82	7	12	Increase
3,197	49	23	28	Increase
2,100	89	1	10	Increase
11,000	-	-	-	Remain
350	81	13	6	Remain
220	-	-	-	Remain
7,772	60	20	20	Remain
420	-	-	-	Decrease
909	61	28	11	Increase
40	58	25	18	Remain
2,750	62	10	28	Increase

9.2.10 - Insights industry employees

COUNTRY	Full time employees				Part time employees			
	# Full-time	Researchers (%)	Data analysts (%)	Consultants (%)	# Part time	Researchers (%)	Data analysts (%)	Consultants (%)
Norway	287	65	26	9	88	-	100	-
Pakistan	838	69	21	10	1,978	20	8	72
Panama	220	70	20	10	100	40	30	30
Peru	626	47	41	12	191	39	29	32
Philippines	2,302	87	9	4	752	59	8	33
Poland	1,655	54	22	24	745	29	16	55
Portugal	816	49	14	37	574	50	8	42
Romania	2,032	50	30	20	2,584	95	1	4
Russia	4,200	41	24	36	1,500	79	19	2
Slovenia	200	-	-	-	30	-	-	-
South Korea	2,508	-	-	-	263	-	-	-
Spain	5,581	-	-	-	7,456	-	-	-
Sri Lanka	196	80	15	5	680	90	5	5
Sudan	80	60	9	31	948	76	1	23
Thailand	2,119	55	25	20	460	94	6	0
Tunisia	400	-	-	-	200	-	-	-
Turkey	1,365	-	-	-	675	-	-	-
United Kingdom	49,000	-	-	-	21,000	-	-	-
Uruguay	36	-	-	-	81	-	-	-
Vietnam	1,467	66	24	10	1,712	73	17	10

Not all countries provided data.
Figures may not sum up due to rounding.
ESOMAR recognises that these roles may overlap.
Please understand these tables as an approximation

	Resulting Total				
	# Resulting Total	Researchers (%)	Data analysts (%)	Consultants (%)	Expectation of employee change in 2022
	375	50	43	7	Increase
	2,816	35	12	54	Increase
	320	61	23	16	Increase
	817	45	38	17	Increase
	3,054	80	9	11	Increase
	2,400	46	20	34	Increase
	1,390	49	12	39	Remain
	4,616	75	14	11	Increase
	5,700	51	23	26	Remain
	230	-	-	-	Remain
	2,771	-	-	-	Remain
	13,037	-	-	-	I don't know
	876	88	7	5	Remain
	1,028	75	2	24	I don't know
	2,579	62	22	16	Increase
	600	-	-	-	Remain
	2,040	-	-	-	Remain
	70,000	-	-	-	Increase
	117	-	-	-	Decrease
	3,179	70	20	10	Increase

9.3 Data Gathering

9.3.1 - Domestic versus multi-country projects (%)

COUNTRY	Domestic projects (%)	Multi-country studies (%)
Armenia	25	75
Australia	89	11
Austria	85	15
Bangladesh	90	10
Brazil	100	0
Bulgaria	24	76
Canada	100	0
Chile	85	15
Colombia	95	5
Costa Rica	70	30
Croatia	97	3
Cyprus	80	20
Czech Republic	60	40
Dem. Rep. Congo	60	40
Dominican Republic	50	50
Egypt	95	5
El Salvador	50	50
Finland	75	25
France	69	31
Georgia	86	14
Greece	97	3
Guatemala	50	50
Guyana	75	25
Honduras	60	40
Hong Kong	50	50
India	34	66
Indonesia	88	12
Iran	100	0
Iraq	80	20
Ireland	91	9
Italy	94	6
Jamaica	90	10
Japan	97	3
Kazakhstan	100	0
Laos	95	5
Lebanon	68	32
Malaysia	85	15
Mexico	90	10
Mongolia	100	0
New Zealand	87	13

COUNTRY	Domestic projects (%)	Multi-country studies (%)
Nicaragua	90	10
Nigeria	90	10
Norway	93	7
Pakistan	73	27
Panama	40	60
Peru	95	5
Philippines	93	7
Poland	90	10
Portugal	97	3
Romania	24	76
Russia	91	9
Singapore	30	70
Slovenia	20	80
South Korea	93	7
Spain	75	25
Sri Lanka	100	0
Sudan	74	26
Taiwan	90	10
Thailand	89	11
Tunisia	95	5
Turkey	88	12
United Kingdom	67	33
Uruguay	91	9
Vietnam	86	14
Weighted total Europe	**69.76**	**30.24**
Weighted total North America	**-**	**-**
Weighted total Asia Pacific	**73.08**	**26.92**
Weighted total Latin America	**92.30**	**7.70**
Weighted total Africa	**88.85**	**11.15**
Weighted total Middle East	**86.55**	**13.45**
Weighted total World	**72.66**	**27.34**

Definitions for the categories presented above can be found in the Glossary.
Not all countries provided data.
Figures may not sum up due to rounding.
Not enough data was obtained to extract a weighted total for North America.

9.3.1.1 - Three main countries for international projects

COUNTRY	Main country		Second country	
	Name	%	Name	%
Armenia	Russia	10	Georgia	5.0
Australia	United Kingdom	4.6	New Zealand	2.2
Costa Rica	Guatemala	10	Panama	10
Croatia	Serbia	0.5	Bosnia and Herzegovina	0.5
Dominican Republic	Guatemala	10	-	-
El Salvador	Guatemala	10	Honduras	10
Georgia	Azerbaijan	7.2	Uzbekistan	3.2
Guatemala	El Salvador	17	Honduras	10
Honduras	Guatemala	20	El Salvador	10
Hong Kong	China	17	Japan	2.2
Indonesia	Thailand	2.8	Vietnam	2.3
Iraq	USA	10	-	-
Ireland	United Kingdom	4.4	USA	2.2
Italy	France	1.4	Switzerland	0.6
Jamaica	Trinidad and Tobago	8.0	Barbados	1.0
Japan	USA	0.9	China	0.9
Lebanon	United Arab Emirates	6.0	Syria	3.0
Malaysia	Singapore	3.9	Indonesia	3.5
Mexico	Brazil	3.1	Colombia	2.6
New Zealand	United Kingdom	3.5	USA	3.1
Norway	Sweden	3.4	United Kingdom	1.4
Pakistan	United Arab Emirates	13	China	8.3
Panama	Guatemala	20	Costa Rica	15
Peru	Colombia	1.0	Ecuador	1.0
Philippines	Singapore	2.8	China	0.8
Portugal	Spain	1.2	United Kingdom	0.9
Romania	United Kingdom	21	France	16
South Korea	USA	2.0	China	1.3
Taiwan	China	5.0	USA	1.0
Thailand	Japan	3.1	Myanmar	1.0
Tunisia	Tunisia	2.0	Algeria	1.0
Uruguay	USA	3.0	Argentina	2.0
Vietnam	Malaysia	2.9	Philippines	2.6

Third country		Rest of the world (%)	Total multi-country studies (%)	Total domestic studies (&)
Name	%			
Belarus	5.0	55	75	25
USA	1.1	3.1	11	89
-	-	10	30	70
Slovenia	0.5	1.6	3.0	97.0
-	-	40	50	50
-	-	30	50	50
Armenia	1.3	2.3	14	86
Costa Rica	7.0	16	50	50
-	-	10	40	60
Australia	1.6	29	50	50
Malaysia	1.3	5.7	12	88
-	-	10	20	80
Germany	0.2	1.8	8.6	91.4
Belgium	0.5	3.6	6.0	94.0
Cayman Islands	1.0	0	10	90
India	0.3	0.9	3.0	97.0
Iraq	5.0	18	32	68
Thailand	1.2	6.4	15	85
Chile	1.0	3.3	10	90
Australia	2.9	3.5	13	87
Denmark	1.1	1.1	7.0	93.0
United Kingdom	3.4	2.6	27	73
-	-	25	60	40
Bolivia	1.0	2.0	5.0	95.0
India	0.6	2.8	7.0	93.0
Cabo Verde	0.7	0.2	3.0	97.0
Germany	6.0	33	76	24
Germany	1.1	2.9	7.3	92.7
Singapore	1.0	3.0	10	90
Vietnam	1.0	6.0	11	89
Libya	1.0	1.0	5.0	95.0
Brazil	1.0	3.0	9.0	91.0
Australia	2.2	6.4	14	86

Definitions for the categories presented above can be found in the Glossary.
Not all countries provided data.
Figures may not sum up due to rounding.

9.3.2 - Spend by quantitative / qualitative methodologies

COUNTRY	Quantitative research (%)	Qualitative research (%)	Other (%)	Data gathering/ processing (%)	Reporting (%)
Argentina	93	6	0	99	1
Armenia	75	15	3	93	7
Australia	63	23	4	90	10
Bangladesh	58	13	1	72	28
Brazil	74	9	1	84	16
Bulgaria	60	24	10	94	6
Canada	66	10	8	84	16
Chile	61	8	29	98	2
China	80	15	0	94	6
Colombia	65	23	2	90	10
Costa Rica	50	30	5	85	15
Croatia	80	17	1	97	3
Cyprus	70	20	10	100	0
Czech Republic	84	13	0	97	3
Dem. Rep. Congo	65	14	9	88	12
Dominican Republic	60	30	5	95	5
El Salvador	50	30	5	85	15
France	87	13	0	100	0
Georgia	57	27	6	89	11
Germany	92	7	1	100	0
Greece	87	11	0	98	2
Guatemala	42	40	6	88	12
Guyana	25	60	0	85	15
Honduras	60	30	5	95	5
Hong Kong	71	17	2	90	10
India	72	4	0	76	24
Indonesia	80	16	0	97	3
Iran	70	20	5	95	5
Iraq	60	30	10	100	0
Ireland	81	17	0	98	2
Italy	86	9	2	97	3
Jamaica	50	20	0	70	30
Japan	73	21	2	96	4
Kazakhstan	69	17	14	100	0
Laos	90	10	0	100	0
Lebanon	75	10	3	88	12
Lithuania	90	10	0	100	0
Malaysia	80	7	1	88	12
Mexico	60	30	9	100	0
Mongolia	30	20	0	50	50
Netherlands	63	18	0	80	20
New Zealand	64	19	9	92	8
Nicaragua	60	40	0	100	0
Nigeria	75	21	1	97	3

COUNTRY	Quantitative research (%)	Qualitative research (%)	Other (%)	Data gathering/ processing (%)	Reporting (%)
Norway	52	18	0	70	30
Pakistan	79	17	2	98	2
Panama	60	30	5	95	5
Peru	65	24	2	91	9
Philippines	73	20	3	97	3
Poland	89	8	0	98	2
Portugal	82	9	3	93	7
Romania	80	18	0	98	2
Russia	74	8	3	85	15
Singapore	75	10	0	85	15
Slovenia	85	9	2	96	4
South Korea	88	9	3	100	0
South Pacific	90	10	0	100	0
Spain	92	4	4	100	0
Sri Lanka	78	18	2	98	2
Sudan	73	22	0	95	5
Taiwan	70	15	5	90	10
Thailand	76	20	0	96	4
Tunisia	71	25	2	98	2
Turkey	88	8	4	100	0
United Kingdom	70	7	0	77	23
Uruguay	89	9	1	99	1
USA	60	14	2	77	23
Vietnam	67	28	4	98	2
Weighted total Europe	**76.36**	**8.62**	**0.45**	**85.43**	**14.57**
Weighted total North America	**60.49**	**14.17**	**2.13**	**76.79**	**23.21**
Weighted total Asia Pacific	**73.54**	**18.09**	**1.94**	**93.57**	**6.43**
Weighted total Latin America	**67.45**	**18.78**	**6.16**	**92.39**	**7.61**
Weighted total Africa	**74.17**	**21.02**	**1.46**	**96.64**	**3.36**
Weighted total Middle East	**73.75**	**18.51**	**4.08**	**96.34**	**3.66**
Weighted total	**65.17**	**13.51**	**1.82**	**80.50**	**19.50**

Definitions for the categories presented above can be found in the Glossary.
Not all countries provided data.
Figures may not sum up due to rounding.

9.3.3 - Spend by established / technology-enabled methodologies

COUNTRY	Established research (%)	Technology-enabled research (%)	Other uncategorised activity (%)	Data gathering/ processing (%)	Reporting (%)
Armenia	89	1	3	93	7
Australia	65	19	6	90	10
Bangladesh	66	3	4	72	28
Brazil	37	46	1	84	16
Bulgaria	76	8	10	94	6
Canada	67	6	10	84	16
Chile	62	1	35	98	2
China	73	5	16	94	6
Colombia	69	19	2	90	10
Costa Rica	74	6	5	85	15
Czech Republic	67	27	3	97	3
Dem. Rep. Congo	71	7	10	88	12
Dominican Republic	86	4	5	95	5
El Salvador	78	2	5	85	15
France	52	45	3	100	0
Georgia	82	1	7	89	11
Germany	99	0	1	100	0
Greece	62	36	0	98	2
Guatemala	55	22	11	88	12
Guyana	64	11	10	85	15
Honduras	87	3	5	95	5
Hong Kong	88	0	2	90	10
India	18	58	0	76	24
Indonesia	73	24	0	97	3
Iran	85	5	5	95	5
Iraq	90	0	10	100	0
Ireland	92	3	3	98	2
Italy	55	39	4	97	3
Japan	71	10	15	96	4
Kazakhstan	84	0	16	100	0
Laos	100	0	0	100	0
Lebanon	80	5	3	88	12
Malaysia	75	12	1	88	12
Mexico	90	0	10	100	0
Mongolia	50	0	0	50	50
Netherlands	48	13	19	80	20
New Zealand	63	9	20	92	8
Nicaragua	100	0	0	100	0
Nigeria	88	8	1	97	3
Norway	55	2	12	70	30

COUNTRY	Quantitative research (%)	Qualitative research (%)	Other (%)	Data gathering/ processing (%)	Reporting (%)
Pakistan	68	27	3	98	2
Panama	86	4	5	95	5
Peru	86	2	3	91	9
Philippines	76	17	4	97	3
Poland	67	25	6	98	2
Portugal	87	1	5	93	7
Romania	93	5	1	98	2
Russia	69	12	4	85	15
Singapore	69	16	0	85	15
South Korea	89	0	11	100	0
Spain	63	33	4	100	0
Sri Lanka	77	19	2	98	2
Sudan	95	0	0	95	5
Taiwan	64	22	5	90	10
Thailand	89	7	0	96	4
Tunisia	93	3	2	98	2
Turkey	90	4	6	100	0
United Kingdom	33	36	8	77	23
Uruguay	54	35	10	99	1
USA	33	44	0	77	23
Vietnam	87	7	4	98	2
Weighted total Europe	**48.44**	**30.65**	**6.35**	**85.43**	**14.57**
Weighted total NorthAmerica	**32.95**	**43.71**	**0.12**	**76.79**	**23.21**
Weighted total Asia Pacific	**71.87**	**10.51**	**11.19**	**93.57**	**6.43**
Weighted total Latin America	**65.75**	**19.20**	**7.44**	**92.39**	**7.61**
Weighted total Africa	**87.68**	**7.46**	**1.50**	**96.64**	**3.36**
Weighted total Middle East	**77.02**	**15.07**	**4.25**	**96.34**	**3.66**
Weighted total	**40.58**	**37.30**	**2.62**	**80.50**	**19.50**

Definitions for the categories presented above can be found in the Glossary.
Not all countries provided data.
Figures may not sum up due to rounding.

9.3.4 - Breakdown of research methodologies (%)

COUNTRY	QUANTITATIVE									QUALITATIVE								
	Established			Tech-enabled						Established				T-E				
	Telephone CATI	Face-to-face	Online/ mobile quantitative research	Audience measurement	Online traffic / Web analytics	Automated digital / electronic	Social media monitoring	Other	Total quantitative	F2F Group discussions / Focus groups	In-depth face to face interviews	Online/ Mobile Qual	Traditional Ethnography	Online research communities (incl. Blogging)	Other	Total quantitative	Other	Reporting
Armenia	58	13	3	0	0	0	1	0	75	10	3	2	0	0	0	15	3	7
Australia	9	5	29	4	5	6	4	1	63	5	5	8	0	4	1	23	4	10
Bangladesh	13	26	17	0	0	0	0	3	58	3	2	5	0	3	0	13	1	28
Brazil	11	5	14	-	5	36	5	0	74	1	0	7	0	2	0	9	1	16
Bulgaria	12	3	41	0	1	2	1	0	60	5	0	14	1	4	0	24	10	6
Canada	9	1	36	13	4	0	1	2	66	1	1	6	0	2	0	10	8	16
Chile	15	11	30	-	-	1	-	4	61	5	1	-	0	-	1	8	29	2
China	6	13	32	10	2	1	1	14	80	5	5	2	0	1	2	15	0	6
Colombia	7	14	26	3	7	3	5	0	65	5	5	7	2	4	0	23	2	10
Costa Rica	13	2	30	1	1	2	1	0	50	6	5	15	2	2	0	30	5	15
Czech Republic	10	9	34	3	0	25	1	2	84	5	3	2	1	1	1	13	0	3
Dem. Rep. Congo	22	6	26	3	1	3	3	1	65	7	4	2	1	0	0	14	9	12
Dom. Republic	15	11	30	1	1	1	1	0	60	14	4	10	1	1	0	30	5	5
El Salvador	15	15	20	0	0	0	0	0	50	12	4	12	0	2	0	30	5	15
France	9	5	31	-	0	39	0	3	87	2	1	3	1	6	0	13	0	0
Georgia	21	6	4	24	0	0	1	0	57	14	9	3	0	0	0	27	6	11
Germany	15	8	69	-	-	0	-	-	92	2	1	4	-	-	0	7	1	0
Greece	20	12	12	7	0	36	0	0	87	0	2	9	0	0	0	11	0	2
Guatemala	6	3	21	-	-	10	2	0	42	8	4	12	1	10	5	40	6	12
Guyana	5	5	9	-	-	-	6	0	25	4	6	35	-	5	10	60	0	15
Honduras	15	15	28	0	0	0	2	0	60	10	6	12	1	1	0	30	5	5
Hong Kong	7	16	48	0	0	0	0	0	71	7	5	5	1	0	0	17	2	10
Indonesia	1	36	15	5	1	21	0	0	80	7	3	5	0	1	0	16	0	3
Iran	30	15	25	0	0	0	0	0	70	5	5	5	0	5	0	20	5	5
Iraq	10	45	5	0	0	0	0	0	60	25	5	0	0	0	0	30	10	0
Ireland	10	17	31	20	0	0	0	3	81	0	2	11	0	3	0	17	0	2
Italy	8	8	32	0	0	37	0	1	86	1	1	5	1	1	1	9	2	3
Japan	1	7	54	0	0	0	1	9	73	3	3	3	0	9	3	21	2	4
Kazakhstan	15	44	8	0	0	0	0	2	69	2	4	11	0	0	0	17	14	0
Laos	5	85	0	0	0	0	0	0	90	5	5	0	0	0	0	10	0	0
Lebanon	14	47	5	4	0	3	2	0	75	5	3	2	0	0	0	10	3	12
Malaysia	9	12	40	7	5	4	3	0	80	1	0	6	0	0	0	7	1	12
Mexico	22	16	22	0	0	0	0	0	60	0	11	19	0	0	0	30	9	0
Mongolia	13	10	8	0	0	0	0	0	30	10	8	3	0	0	0	20	0	50
Netherlands	3	4	36	0	3	9	-	7	63	2	3	-	-	-	12	18	0	20
New Zealand	5	4	38	3	1	3	1	9	64	4	4	5	1	4	2	19	9	8

COUNTRY	QUANTITATIVE									QUALITATIVE								
	Established			Tech-enabled						Established				T-E				
	Telephone CATI	Face-to-face	Online/ mobile quantitative research	Audience measurement	Online traffic / Web analytics	Automated digital / electronic	Social media monitoring	Other	Total quantitative	F2F Group discussions / Focus groups	In-depth face to face interviews	Online/ Mobile Qual	Traditional Ethnography	Online research communities (incl. Blogging)	Other	Total quantitative	Other	Reporting
Nicaragua	10	30	20	0	0	0	0	0	60	20	10	10	0	0	0	40	0	0
Nigeria	6	35	30	1	1	1	1	-	75	1	1	14	0	5	0	21	1	3
Norway	18	6	25	0	1	0	0	2	52	5	2	0	0	2	10	18	0	30
Pakistan	4	35	2	12	2	25	0	0	79	10	4	2	1	0	0	17	2	2
Panama	20	5	33	1	0	1	0	0	60	10	5	10	2	3	0	30	5	5
Peru	7	26	16	14	0	0	1	1	65	5	5	12	1	1	0	24	2	9
Philippines	2	26	26	5	1	12	2	0	73	2	3	12	0	3	1	20	3	3
Poland	12	11	28	8	1	24	-	6	89	2	1	5	0	0	0	8	0	2
Portugal	21	16	11	33	0	0	0	2	82	5	2	0	0	1	1	9	3	7
Romania	4	2	72	0	0	1	0	0	80	2	3	8	0	4	0	18	0	2
Russia	18	15	29	1	0	10	1	0	74	4	1	1	0	1	1	8	3	15
Singapore	8	4	40	9	3	7	4	0	75	4	1	3	0	2	0	10	0	15
South Korea	17	22	41	0	-	0	-	8	88	4	3	2	0	0	0	9	3	0
Spain	12	11	36	-	1	33	-	-	92	2	-	2	-	-	-	4	4	0
Sri Lanka	16	33	7	4	2	15	1	0	78	3	3	11	0	1	0	18	2	2
Sudan	20	33	20	0	0	0	0	0	73	13	10	0	0	0	0	22	0	5
Taiwan	2	2	40	9	3	11	3	0	70	4	0	6	1	5	0	15	5	10
Thailand	4	43	27	0	0	0	1	0	76	5	2	8	0	5	0	20	0	4
Tunisia	25	35	1	7	1	1	1	0	71	20	4	1	1	0	0	25	2	2
Turkey	10	30	44	1	1	0	0	1	88	0	0	4	0	3	1	8	4	0
United Kingdom	2	2	22	-	18	4	14	7	70	0	0	6	0	-	1	7	0	23
Uruguay	20	9	3	13	0	35	0	9	89	4	2	3	0	0	0	9	1	1
USA	4	0	33	1	11	10	2	0	60	1	2	6	1	3	1	14	2	23
Vietnam	3	32	16	9	0	6	0	1	67	18	7	2	0	0	0	28	4	2
Weighted total Europe	**5.7**	**4.6**	**30.9**	**0.4**	**10.7**	**10.7**	**8.4**	**4.9**	**76.4**	**1.0**	**0.5**	**4.9**	**0.3**	**0.9**	**1.0**	**8.6**	**0.4**	**14.6**
Weighted total North America	**3.7**	**0.1**	**32.7**	**0.9**	**11.1**	**10.1**	**1.9**	**0.0**	**60.5**	**1.3**	**1.7**	**6.2**	**0.6**	**3.2**	**1.2**	**14.2**	**2.1**	**23.2**
Weighted total Asia Pacific	**6.0**	**11.3**	**36.4**	**5.2**	**2.3**	**2.7**	**1.9**	**7.8**	**73.5**	**4.4**	**4.2**	**4.3**	**0.1**	**3.6**	**1.5**	**18.1**	**1.9**	**6.4**
Weighted total Latin America	**14.6**	**11.8**	**20.7**	**1.4**	**2.6**	**13.3**	**2.4**	**0.6**	**67.5**	**2.0**	**4.7**	**10.1**	**0.5**	**1.2**	**0.2**	**18.8**	**6.2**	**7.6**
Weighted total Africa	**8.5**	**33.6**	**27.3**	**1.6**	**1.0**	**1.1**	**1.1**	**0.0**	**74.2**	**3.0**	**1.5**	**12.2**	**0.1**	**4.3**	**0.0**	**21.0**	**1.5**	**3.4**
Weighted total Middle East	**13.1**	**32.0**	**9.0**	**6.0**	**0.7**	**12.4**	**0.4**	**0.1**	**73.8**	**10.0**	**4.2**	**2.3**	**0.3**	**1.5**	**0.1**	**18.5**	**4.1**	**3.7**
Weighted total World	**4.4**	**2.3**	**32.6**	**1.3**	**10.0**	**9.5**	**3.2**	**1.8**	**65.2**	**1.6**	**1.7**	**5.8**	**0.5**	**2.7**	**1.1**	**13.5**	**1.8**	**19.5**

Definitions for the categories presented above can be found in the Glossary.
Not all countries provided data. Figures may not sum up due to rounding.

9.3.5 - Spend by project type (%)

COUNTRY	Market Measurement	Market Modeling	New Product / Service Development	Advertising Pre-Testing (Copy)	Advertising / Brand Tracking	Media Audience / Research	Employee Satisfaction	CRM Systems / Customer Satisfaction	Mystery Shopping	Omnibus / Shared Cost Surveys	Usage & Attitude Studies	Opinion Research / Polling	User Experience (Ux) research	Non-profit Research	Business-to-Business Studies	Other
Armenia	5	3	7	5	5	7	5	6	5	7	11	19	7	4	4	0
Australia	19	1	9	8	8	4	6	11	2	2	7	7	6	5	3	3
Bangladesh	34	1	5	2	6	2	2	12	0	0	8	5	6	13	1	2
Brazil	37	4	3	3	5	-	3	11	2	3	5	12	2	0	2	7
Bulgaria	2	5	18	6	14	2	1	1	0	3	14	13	14	4	3	0
Canada	9	5	4	3	13	19	3	8	2	2	7	7	2	1	2	13
China	5	2	7	4	4	12	-	9	7	-	10	-	4	-	1	36
Colombia	13	6	8	4	12	10	1	2	5	1	20	6	9	1	2	0
Costa Rica	11	2	10	7	13	5	4	4	2	4	18	6	6	4	4	0
Croatia	18	0	7	2	2	53	0	4	1	1	6	4	0	0	1	0
Czech Republic	32	2	14	6	11	7	2	4	6	1	8	1	1	1	1	3
Dem. Rep. Congo	8	3	9	6	10	9	2	8	7	5	11	3	3	6	10	0
Dominican Republic	10	3	14	13	20	4	3	3	3	7	18	1	0	1	0	0
El Salvador	6	2	12	10	18	4	4	4	2	3	18	14	1	1	1	0
Georgia	7	3	10	8	8	28	0	5	4	0	7	14	5	0	1	0
Greece	44	2	6	1	7	12	0	6	3	1	7	9	0	0	1	1
Guatemala	1	2	12	13	28	5	1	4	2	0	17	8	0	5	2	0
Guyana	10	10	15	-	-	11	3	7	5	2	9	8	-	15	5	-
Honduras	6	2	9	8	23	1	3	3	3	2	18	11	3	8	0	0
Hong Kong	12	5	9	3	22	3	2	14	2	0	22	0	5	2	0	0
Indonesia	30	4	9	8	7	5	3	6	1	4	10	2	4	4	4	0
Iran	15	2	20	12	15	4	0	0	0	0	20	2	0	0	7	3
Iraq	10	0	5	5	0	0	0	0	0	0	0	70	0	10	0	0
Ireland	13	2	12	9	20	4	3	7	2	8	12	3	1	0	5	0
Italy	8	0	2	6	17	8	0	21	6	0	12	10	2	0	7	1
Jamaica	10	2	15	10	12	10	5	10	2	5	8	5	2	-	4	-
Lebanon	3	0	0	1	1	3	0	2	4	1	4	76	0	0	5	0
Malaysia	23	0	7	11	18	5	1	12	2	0	11	4	0	0	5	0
Mexico	3	1	11	6	12	4	0	4	2	2	11	26	5	1	2	10
Mongolia	5	5	10	3	10	0	2	20	2	2	10	20	2	1	6	3
New Zealand	12	4	13	4	26	5	2	11	0	2	11	1	3	1	3	3
Nicaragua	6	0	5	5	9	2	5	6	6	4	22	14	5	6	5	0
Nigeria	33	2	20	3	7	5	0	0	1	1	10	10	3	1	5	0
Norway	20	10	10	0	5	0	5	5	30	0	10	0	5	0	0	0
Pakistan	28	0	3	8	20	18	1	6	5	1	6	1	1	1	2	0
Panama	8	4	12	10	15	6	4	5	3	10	18	4	1	0	0	0
Peru	26	2	10	4	10	13	4	3	4	1	6	8	2	0	3	4

COUNTRY	Market Measurement	Market Modeling	New Product / Service Development	Advertising Pre-Testing (Copy)	Advertising / Brand Tracking	Media Audience / Research	Employee Satisfaction	CRM Systems / Customer Satisfaction	Mystery Shopping	Omnibus / Shared Cost Surveys	Usage & Attitude Studies	Opinion Research / Polling	User Experience (Ux) research	Non-profit Research	Business-to-Business Studies	Other
Philippines	11	1	10	8	26	6	0	8	1	0	19	2	0	1	4	1
Poland	35	6	11	3	9	12	1	4	3	2	4	5	0	1	0	4
Portugal	31	0	3	3	13	19	0	9	2	2	6	6	0	0	0	4
Romania	31	1	10	2	31	0	0	3	0	0	4	14	1	0	1	2
Russia	35	3	5	1	13	1	1	4	1	3	10	17	1	0	5	0
Slovenia	22	15	5	3	2	32	2	2	3	3	4	6	1	1	2	0
South Korea	9	3	10	1	7	0	8	0	2	1	9	8	1	35	3	3
Sri Lanka	28	2	17	2	20	14	2	2	1	0	5	5	0	0	2	0
Sudan	40	10	0	0	5	5	0	15	5	0	15	5	0	0	0	0
Thailand	0	0	31	3	19	0	0	14	12	0	16	1	2	1	1	2
Turkey	54	3	7	3	9	7	4	2	1	1	5	1	0	1	1	2
Uruguay	37	3	2	2	5	22	5	4	2	5	1	8	0	1	2	1
USA	11	1	5	1	3	14	3	23	0	3	12	6	16	1	1	0
Vietnam	26	1	18	2	12	13	0	7	5	0	11	1	1	0	2	0
Weighted total Europe	**23.2**	**2.3**	**6.7**	**4.1**	**14.2**	**7.2**	**1.0**	**9.9**	**4.6**	**1.5**	**9.2**	**8.9**	**1.9**	**0.3**	**3.8**	**1.2**
Weighted total North America	**11.1**	**1.1**	**5.1**	**1.0**	**3.1**	**14.5**	**3.0**	**22.6**	**0.0**	**3.2**	**12.1**	**6.0**	**15.9**	**0.5**	**0.5**	**0.2**
Weighted total Asia Pacific	**11.5**	**1.6**	**8.7**	**5.1**	**7.2**	**7.3**	**2.8**	**9.3**	**4.5**	**0.9**	**9.2**	**3.0**	**4.3**	**4.5**	**2.0**	**18.1**
Weighted total Latin America	**19.2**	**2.7**	**7.6**	**4.8**	**9.6**	**4.1**	**1.6**	**6.4**	**2.4**	**2.4**	**9.9**	**15.6**	**4.1**	**0.7**	**2.2**	**6.6**
Weighted total Africa	**31.8**	**1.7**	**19.2**	**3.1**	**7.1**	**5.2**	**0.1**	**0.6**	**1.4**	**0.7**	**10.1**	**9.6**	**3.0**	**1.3**	**5.2**	**0.0**
Weighted total Middle East	**19.2**	**0.5**	**7.6**	**7.9**	**13.8**	**10.1**	**0.3**	**2.9**	**2.8**	**0.6**	**8.8**	**19.0**	**0.4**	**1.7**	**3.4**	**0.8**
Weighted total World	**11.6**	**1.2**	**5.6**	**1.6**	**3.9**	**13.4**	**2.9**	**20.7**	**0.6**	**3.0**	**11.7**	**5.9**	**14.2**	**0.9**	**0.8**	**2.0**

Definitions for the categories presented above can be found in the Glossary.
Not all countries provided data. Figures may not sum up due to rounding.

9.3.6 - Spend by research design (%)

COUNTRY	Ad hoc research	Omnibus surveys	Panel research	Other syndicated research	Other continuous	Self-serve platforms	Other types of research
Argentina	29	0	58	0	12	0	1
Armenia	37	18	15	10	10	5	5
Australia	53	3	14	1	28	1	1
Bangladesh	85	1	6	0	7	0	1
Brazil	43	3	36	5	10	0	4
Bulgaria	60	1	14	0	18	0	7
Canada	47	3	20	8	18	4	0
China	52	0	10	4	19	0	15
Colombia	50	5	25	0	20	0	0
Costa Rica	39	4	22	1	34	0	0
Croatia	75	7	11	3	3	1	1
Czech Republic	43	1	31	2	21	0	2
Dem. Rep. Congo	40	10	8	0	42	0	0
Dominican Republic	40	10	18	2	28	2	0
El Salvador	45	4	18	3	28	2	0
Georgia	18	2	30	0	16	17	17
Germany	16	1	37	-	46	0	0
Greece	29	0	51	2	19	0	0
Guatemala	60	1	24	0	12	2	1
Guyana	77	6	2	-	15	0	-
Honduras	55	5	10	4	26	0	0
Hong Kong	66	0	12	4	13	2	2
Indonesia	55	2	34	2	7	0	0
Iran	100	-	-	-	-	-	-
Iraq	60	15	7	3	15	0	0
Ireland	33	11	20	5	31	0	0
Italy	40	0	54	0	4	0	1
Jamaica	67	6	7	-	20	0	-
Japan	55	1	30	1	7	2	5
Kazakhstan	51	0	49	0	0	0	0
Laos	98	0	0	0	2	0	0
Lebanon	84	1	4	2	4	3	2
Malaysia	48	0	35	3	8	4	2
Mexico	83	1	4	1	7	3	1
Mongolia	70	10	0	0	5	0	15
Netherlands	27	1	23	0	23	0	27
New Zealand	45	4	6	3	35	0	7

COUNTRY	Ad hoc research	Omnibus surveys	Panel research	Other syndicated research	Other continuous	Self-serve platforms	Other types of research
Nicaragua	60	10	13	2	15	0	0
Nigeria	85	1	3	2	8	1	0
Norway	77	8	16	0	0	0	0
Pakistan	25	1	22	1	50	0	1
Panama	47	5	12	2	32	2	0
Peru	53	3	25	11	8	0	0
Philippines	75	0	10	1	13	0	1
Poland	36	1	46	-	13	0	4
Portugal	45	6	48	0	1	0	0
Romania	37	1	37	1	21	1	2
Russia	47	14	29	2	5	3	0
Singapore	60	0	20	5	15	0	0
Slovenia	31	4	44	7	14	0	0
South Korea	63	1	15	-	15	0	5
South Pacific	90	3	3	1	3	0	0
Spain	45	0	37	-	17	0	0
Sri Lanka	36	0	40	2	20	0	2
Sudan	80	0	20	0	0	0	0
Taiwan	60	0	30	0	10	0	0
Thailand	63	0	2	0	31	4	1
Tunisia	70	5	15	5	5	0	0
Turkey	35	12	42	1	10	0	0
Uruguay	31	27	35	0	3	2	2
USA	29	10	43	0	15	3	0
Vietnam	62	0	23	8	7	0	0
Weighted total Europe	**30.40**	**2.41**	**36.93**	**0.43**	**26.79**	**0.24**	**2.79**
Weighted total N. America	**28.75**	**10.37**	**42.48**	**0.09**	**15.21**	**3.11**	**0.00**
Weighted total Asia Pacific	**54.66**	**1.19**	**16.50**	**2.06**	**18.03**	**0.72**	**6.83**
Weighted total Latin America	**57.06**	**2.84**	**23.61**	**2.68**	**11.14**	**1.11**	**1.56**
Weighted total Africa	**81.55**	**1.76**	**4.40**	**2.14**	**9.29**	**0.86**	**0.00**
Weighted total Middle East	**57.02**	**2.33**	**11.88**	**1.25**	**26.65**	**0.35**	**0.52**
Weighted total World	**32.44**	**8.59**	**38.65**	**0.39**	**16.30**	**2.59**	**1.04**

Definitions for the categories presented above can be found in the Glossary.
Not all countries provided data. Figures may not sum up due to rounding.

9.4 Origin and Types of Clients

9.4.1 - Domestic versus international clients (%)

COUNTRY	Domestic clients	International clients
Argentina	93	7
Armenia	35	65
Australia	93	7
Austria	98	2
Bangladesh	52	48
Brazil	90	10
Bulgaria	39	61
Canada	100	0
Chile	84	16
China	96	4
Colombia	81	19
Costa Rica	70	30
Croatia	65	35
Cyprus	75	25
Czech Republic	45	55
Dem. Rep. Congo	40	60
Dominican Republic	60	40
Egypt	70	30
El Salvador	30	70
Finland	80	20
France	77	23
Georgia	65	35
Germany	70	30
Greece	80	20
Guatemala	50	50
Guyana	30	70
Honduras	30	70
Hong Kong	77	23
India	24	76
Indonesia	80	20
Iran	98	2
Iraq	5	95
Ireland	94	6
Italy	83	17
Jamaica	98	2
Japan	97	3
Kazakhstan	70	30
Laos	80	20
Lebanon	75	25
Malaysia	74	26
Mexico	91	9

COUNTRY	Domestic clients	International clients
Mongolia	55	45
Netherlands	63	37
New Zealand	82	18
Nicaragua	60	40
Nigeria	20	80
Norway	94	6
Pakistan	75	25
Panama	40	60
Peru	65	35
Philippines	85	15
Poland	87	13
Portugal	77	23
Romania	20	80
Russia	72	28
Singapore	60	40
Slovenia	70	30
South Korea	97	3
Spain	71	29
Sri Lanka	88	12
Sudan	8	92
Taiwan	90	10
Thailand	85	15
Tunisia	80	20
Turkey	34	66
United Kingdom	100	0
Uruguay	37	63
Vietnam	83	17
Weighted total Europe	**88.37**	**11.63**
Weighted total North America	**-**	**-**
Weighted total Asia Pacific	**78.49**	**21.51**
Weighted total Latin America	**85.34**	**14.66**
Weighted total Africa	**25.92**	**74.08**
Weighted total Middle East	**71.29**	**28.71**
Weighted total World	**84.76**	**15.24**

Definitions for the categories presented above can be found in the Glossary.
Not all countries provided data.
Figures may not sum up due to rounding.
Not enough data was obtained to extract a weighted total for North America.

9.4.2 - Spend by client type (%)

COUNTRY	Manufacturing (Consumer Non-Durables)	Manufacturing (Consumer Durables)	Manufacturing (Pharmaceutical)	Manufacturing (Automotive)	Utilities - Electricity, Gas, Water, Postal Services	Wholesale and retail trade	Information and Communication (Advertising)	Information and Communication (Telecommunications and ICT)	Information and Communication (Media and Broadcasting)	Financial and Insurance Activities	Public Administration and defence; compulsory social security	Non-Profit and NGO's, International Organisations (World Bank, UN)	Education - Research Institutes	Tourism, Travel and Recreation	Other
Argentina	34	13	4	2	1	6	4	5	16	7	1	1	-	-	6
Armenia	5	13	2	4	1	3	19	3	5	14	4	20	1	3	4
Australia	13	3	2	3	3	9	4	5	5	9	25	2	3	2	12
Bangladesh	56	7	4	0	0	4	2	4	2	2	0	16	2	0	2
Brazil	45	5	4	4	4	5	5	5	5	5	8	0	1	1	4
Bulgaria	28	7	10	1	1	5	3	2	3	18	0	18	2	0	2
Canada	10	4	6	2	2	6	8	5	17	11	10	3	2	5	9
China	14	3	2	11	3	1	3	3	10	3	20	0	4	4	17
Colombia	27	12	5	3	2	11	4	7	4	12	7	2	1	2	1
Costa Rica	25	11	10	4	2	10	5	10	3	9	2	6	2	1	0
Croatia	12	0	4	1	0	13	10	8	42	4	1	0	1	0	1
Czech Republic	40	1	3	6	2	13	4	4	7	6	2	3	1	1	7
Dem. Rep. Congo	11	2	4	0	3	8	5	28	4	18	0	12	5	0	0
Dom. Republic	30	12	6	3	2	8	4	12	6	5	2	5	2	3	0
El Salvador	34	12	4	2	2	10	8	12	4	4	1	4	2	1	0
France	25	13	6	3	2	8	7	3	-	6	8	-	6	2	12
Georgia	15	6	5	6	0	1	11	1	19	3	1	21	3	0	9
Germany	20	1	4	4	3	9	-	29	16	4	3	-	3	2	3
Greece	51	2	5	2	1	2	6	7	9	4	4	1	6	0	0
Guatemala	25	4	9	1	4	6	5	5	7	10	10	3	9	2	0
Guyana	10	8	-	0	10	0	0	5	5	10	12	25	10	5	-
Honduras	25	15	4	1	3	6	4	12	4	8	4	12	1	1	0
Hong Kong	6	2	1	1	2	7	5	6	5	38	9	0	3	10	5
India	27	10	9	4	1	-	-	16	8	15	-	-	-	-	10
Indonesia	50	4	4	2	0	1	4	13	7	8	1	2	0	1	3
Iran	50	10	5	0	0	5	3	10	5	2	0	0	0	0	10
Iraq	10	0	10	0	0	0	0	0	5	0	15	50	0	0	10
Ireland	4	4	5	0	7	11	5	5	14	14	12	1	6	8	5
Italy	23	4	35	2	4	0	0	6	5	4	14	0	0	0	2
Jamaica	30	5	0	0	5	0	6	5	4	25	10	10	-	-	0
Japan	15	3	17	3	4	3	14	3	10	3	5	0	12	1	6
Kazakhstan	42	2	11	0	0	6	10	7	0	6	6	8	0	0	2
Laos	20	0	0	0	0	0	0	0	0	0	0	80	0	0	0
Lebanon	4	3	3	0	0	2	3	0	5	0	0	80	0	0	0
Malaysia	35	10	7	4	2	5	4	6	5	6	7	3	4	0	2
Mexico	24	35	4	1	1	9	1	2	2	4	11	0	0	1	4
Mongolia	5	5	3	0	3	5	5	5	5	5	25	30	3	3	0

COUNTRY	Manufacturing (Consumer Non-Durables)	Manufacturing (Consumer Durables)	Manufacturing (Pharmaceutical)	Manufacturing (Automotive)	Utilities - Electricity, Gas, Water, Postal Services	Wholesale and retail trade	Information and Communication (Advertising)	Information and Communication (Telecommunications and ICT)	Information and Communication (Media and Broadcasting)	Financial and Insurance Activities	Public Administration and defence; compulsory social security	Non-Profit and NGO's, International Organisations (World Bank, UN)	Education - Research Institutes	Tourism, Travel and Recreation	Other
Netherlands	39	9	4	2	3	4	0	4	6	8	10	0	0	3	9
New Zealand	14	7	3	0	2	9	2	4	1	11	22	1	4	5	15
Nicaragua	30	12	0	0	1	6	6	17	4	5	5	10	3	1	0
Nigeria	38	4	6	1	1	1	4	18	1	1	1	25	1	1	1
Norway	16	1	1	0	10	8	1	8	9	8	25	3	4	1	6
Pakistan	68	7	0	1	0	1	1	12	5	3	0	1	0	0	0
Panama	30	13	7	4	3	12	4	12	4	8	0	1	1	1	0
Peru	35	7	2	4	1	10	5	3	13	9	4	2	2	1	2
Philippines	60	5	6	2	0	0	0	13	5	3	2	1	0	0	1
Poland	34	6	9	2	0	7	3	3	9	5	6	0	8	0	5
Portugal	9	26	5	1	3	5	7	13	20	3	1	0	1	0	7
Romania	54	2	4	0	2	9	1	9	1	11	0	1	0	1	3
Russia	37	19	6	4	0	8	2	8	1	4	3	6	1	1	0
Singapore	25	6	5	4	4	4	2	15	5	10	10	5	2	1	2
Slovenia	3	4	4	4	4	11	16	13	31	7	2	0	0	1	0
South Korea	10	7	1	6	1	3	3	5	2	3	44	0	5	2	9
Spain	19	2	3	5	2	4	1	5	16	5	4	3	25	1	6
Sri Lanka	42	1	1	1	0	5	5	15	12	6	0	6	3	2	1
Sudan	40	15	0	5	0	10	0	15	5	10	0	0	0	0	0
Taiwan	35	4	10	5	1	5	1	10	12	3	5	4	1	2	2
Thailand	28	9	2	22	0	6	6	8	2	3	2	1	1	2	7
Turkey	46	9	8	4	2	6	3	8	7	5	0	1	1	1	1
United Kingdom	30	0	10	2	1	9	-	2	14	11	10	-	-	3	8
Uruguay	38	1	1	2	0	4	10	2	12	5	8	6	5	0	6
USA	10	7	21	6	2	5	6	9	18	7	6	1	1	1	0
Vietnam	43	10	8	3	0	3	8	1	16	4	0	0	2	0	1
Weighted total Europe	**28.1**	**2.9**	**8.7**	**2.4**	**1.6**	**8.1**	**1.2**	**6.1**	**11.5**	**8.6**	**8.5**	**0.4**	**2.1**	**2.6**	**7.3**
Weighted total North America	**10.0**	**6.8**	**21.1**	**5.7**	**2.3**	**4.9**	**5.6**	**8.5**	**18.3**	**6.8**	**6.2**	**1.0**	**1.3**	**1.3**	**0.1**
Weighted total Asia Pacific	**18.2**	**4.9**	**6.4**	**5.8**	**2.7**	**3.2**	**4.4**	**7.1**	**7.9**	**7.5**	**14.0**	**0.8**	**4.3**	**1.8**	**11.1**
Weighted total Latin America	**33.1**	**16.9**	**4.0**	**2.6**	**2.3**	**7.6**	**3.4**	**4.4**	**5.2**	**6.1**	**8.0**	**1.0**	**0.8**	**1.1**	**3.5**
Weighted total Africa	**36.6**	**4.0**	**5.8**	**0.5**	**0.6**	**1.0**	**4.0**	**18.5**	**0.7**	**2.0**	**0.5**	**24.1**	**0.7**	**0.5**	**0.5**
Weighted total Middle East	**48.2**	**6.6**	**3.0**	**0.5**	**0.0**	**2.2**	**1.8**	**8.4**	**4.9**	**2.0**	**2.0**	**16.4**	**0.0**	**0.0**	**4.1**
Weighted total	**14.9**	**5.9**	**16.6**	**5.0**	**2.2**	**5.3**	**4.5**	**7.8**	**15.5**	**7.3**	**7.7**	**0.9**	**1.8**	**1.6**	**3.0**

Definitions for the categories presented above can be found in the Glossary.
Not all countries provided data. Figures may not sum up due to rounding.

9.4.2.1 - Spend by client type - Breakdown of consumer non-durables (%)

COUNTRY	Food, Beverages and Confectionary	OTC medicines, Cosmetics & Hygiene	Tobacco & Cigarettes	Other Consumer Non-Durables	Total Manufacturing (Consumer Non-Durables)
Armenia	2	0	3	0	5
Australia	7	4	0	1	13
Bangladesh	16	15	10	15	56
Brazil	28	10	4	3	45
Bulgaria	8	11	2	7	28
Colombia	15	8	1	3	27
Costa Rica	15	6	2	2	25
Croatia	9	2	0	1	12
Czech Republic	25	9	4	2	40
Dem. Rep. Congo	5	3	3	0	11
Dominican Republic	22	5	2	1	30
El Salvador	24	6	2	2	34
Georgia	8	4	2	1	15
Germany	12	6	1	1	20
Greece	30	10	6	5	51
Guatemala	11	13	1	0	25
Guyana	4	4	-	2	10
Honduras	19	4	1	1	25
Hong Kong	2	4	0	0	6
Indonesia	25	8	10	7	50
Iran	22	11	17	0	50
Ireland	3	2	0	0	4
Italy	12	4	5	2	23
Jamaica	21	-	3	6	30
Laos	7	0	10	3	20
Malaysia	18	4	0	13	35
Mexico	17	5	0	2	24
Mongolia	2	2	2	0	5
New Zealand	12	1	0	1	14
Nicaragua	19	9	2	0	30
Nigeria	27	5	1	6	38
Norway	12	1	2	1	16
Pakistan	44	1	20	4	68
Panama	19	7	2	2	30
Peru	21	5	2	7	35
Philippines	52	4	3	1	60
Poland	27	4	3	1	34
Portugal	1	1	1	5	9
Romania	31	7	15	1	54
Russia	27	3	1	6	37
Singapore	10	9	0	6	25

COUNTRY	Food, Beverages and Confectionary	OTC medicines, Cosmetics & Hygiene	Tobacco & Cigarettes	Other Consumer Non-Durables	Total Manufacturing (Consumer Non-Durables)
South Korea	5	2	1	2	10
Spain	13	3	2	2	19
Sri Lanka	22	5	14	1	42
Sudan	35	0	5	0	40
Taiwan	9	10	6	10	35
Thailand	20	8	0	1	28
Turkey	28	10	5	2	46
United Kingdom	10	-	-	21	30
Uruguay	27	10	1	0	38
USA	5	5	0	0	10
Vietnam	21	17	1	4	43
Weighted total	**6.81**	**4.43**	**0.25**	**3.41**	**14.90**

Not all countries provided data.
Figures may not sum up due to rounding.

9.4.3 - Pro bono research

COUNTRY	Turnover (US$ 1.000) 2021	Pro bono research (US$ 1.000) 2021	Share of Pro Bono on Turnover (%)
Armenia	4,189	180	4.29%
Australia	2,494,661	12,224	0.49%
Austria	125,696	1,257	1.00%
Bangladesh	19,859	457	2.30%
Brazil	357,872	116	0.03%
Canada	764,747	1,404	0.18%
Costa Rica	8,460	40	0.47%
Croatia	25,417	74	0.29%
Czech Republic	147,300	369	0.25%
Dem. Rep. Congo	3,019	136	4.50%
Dominican Republic	12,240	50	0.41%
El Salvador	4,560	30	0.66%
Georgia	5,901	13	0.22%
Guatemala	9,470	5.2	0.05%
Guyana	2,446	29	1.18%
Honduras	3,515	20	0.57%
Hong Kong	107,482	269	0.25%
Indonesia	134,310	107	0.08%
Iraq	5,000	5.0	0.10%
Ireland	98,679	306	0.31%
Italy	691,266	2,143	0.31%
Jamaica	6,046	302	5.00%
Malaysia	100,209	240	0.24%
Mexico	343,607	10,858	3.16%
New Zealand	85,217	426	0.50%
Nigeria	54,491	49	0.09%
Norway	84,231	42	0.05%
Pakistan	18,557	197	1.06%
Panama	6,545	50	0.76%
Peru	64,224	2.6	0.00%
Philippines	121,732	146	0.12%
Romania	133,924	549	0.41%
Russia	351,544	2,444	0.70%
Singapore	218,834	4,377	2.00%
Slovenia	20,957	118	0.56%
Taiwan	91,301	27	0.03%
Thailand	169,089	34	0.02%
Turkey	91,544	139	0.15%
United Kingdom	11,074,575	4,127	0.04%
Vietnam	98,046	49	0.05%

Definitions for the categories presented above can be found in the Glossary.
Not all countries provided data. Figures may not sum up due to rounding.

9.5 Macroeconomic data

9.5.1 - GDP growth rates per country 2017 to 2021 (%)

COUNTRY	2017	2018	2019	2020	2021
Argentina	2.86	-2.51	-3.06	-9.96	10.20
Algeria	1.99	2.06	2.55	-5.99	3.99
Armenia	7.48	5.03	6.00	-7.57	5.66
Australia	2.27	2.81	1.71	-2.44	4.69
Austria	2.90	2.71	1.61	-6.59	4.48
Azerbaijan	0.07	1.35	2.70	-4.29	5.62
Bangladesh	7.14	7.73	7.79	3.80	5.01
Belgium	1.71	1.43	1.21	-6.42	6.27
Bolivia	4.20	4.30	3.90	-7.70	6.11
Brazil	0.98	1.11	0.87	-4.06	4.62
Bulgaria	3.56	3.20	3.70	-3.84	4.18
Cambodia	6.95	7.25	6.97	-3.53	2.15
Canada	3.00	1.83	1.55	-5.40	4.56
Caribbean	-0.54	1.45	0.64	-12.72	40.83
Chile	1.47	4.02	2.51	-5.84	11.69
China	6.86	6.57	6.14	2.27	8.08
Colombia	1.77	2.66	3.36	-6.85	10.56
Costa Rica	3.20	2.67	2.03	-4.80	7.58
Croatia	2.78	2.71	3.03	-9.00	10.45
Cyprus	3.85	3.88	3.11	-5.10	5.51
Czech Republic	4.29	2.91	2.45	-5.56	3.26
Dem. Rep. Congo	3.42	3.95	4.29	-0.06	5.74
Denmark	2.11	1.22	1.70	-3.29	4.13
Dominican Republic	4.57	7.00	4.99	-6.73	12.26
East Africa	4.50	-7.12	-3.27	-14.60	-5.39
Ecuador	2.73	1.05	-0.48	-7.50	4.23
Egypt	4.23	5.31	5.52	3.57	3.33
El Salvador	2.41	2.53	2.50	-8.58	10.30
Estonia	4.85	3.87	3.20	-2.93	8.35
Finland	2.99	2.43	1.24	-2.89	3.30
France	1.85	1.52	1.25	-8.23	6.98
GCC	-0.11	-0.16	1.38	-4.87	2.58
Georgia	4.80	4.71	4.64	-6.10	10.36
Germany	2.51	1.45	0.54	-4.90	2.79
Ghana	8.44	5.64	7.46	0.88	4.23
Greece	1.35	2.10	1.98	-8.25	8.34
Guatemala	2.75	3.10	3.35	-1.50	8.00
Guyana	2.12	3.42	4.43	43.38	19.93
Honduras	4.79	3.70	3.36	-8.00	12.50
Hong Kong	3.82	3.02	0.35	-6.14	6.42
Hungary	3.99	4.94	4.60	-4.96	7.12
Iceland	3.64	4.61	0.82	-6.65	4.35
India	6.74	7.05	6.12	-7.96	8.95
Indonesia	5.07	5.17	5.04	-2.07	3.69
Iran	4.28	-3.93	-9.46	1.52	4.01
Iraq	-0.80	0.59	3.40	-10.89	5.94
Ireland	7.81	6.81	4.25	2.48	13.48
Israel	3.32	3.28	3.13	-2.38	8.19
Italy	1.47	0.88	0.01	-8.87	6.64
Jamaica	0.96	1.38	1.06	-10.22	4.36
Japan	1.71	0.81	0.89	-4.83	1.62
Kazakhstan	3.99	4.10	3.82	-2.60	4.00

COUNTRY	2017	2018	2019	2020	2021
Kenya	4.81	5.96	5.60	-0.13	7.23
Laos	6.83	6.50	6.43	-0.43	2.06
Latvia	4.55	4.77	2.84	-3.62	4.67
Lebanon	1.20	0.25	0.20	-25.00	-
Levant	1.69	2.94	-0.55	-24.71	-15.79
Lithuania	3.83	3.45	3.40	-0.82	4.94
Luxembourg	3.54	2.96	2.56	-1.31	6.89
Maghreb	2.72	-1.38	5.21	-5.12	2.21
Malaysia	5.90	4.72	4.50	-5.59	3.13
Mexico	2.04	1.99	0.40	-8.24	4.80
Mongolia	5.15	6.95	6.50	-5.34	1.42
Mozambique	2.95	3.30	1.80	-0.50	2.16
Myanmar	6.72	6.69	6.20	3.19	-17.94
Netherlands	3.11	2.54	1.77	-3.80	5.03
New Zealand	3.04	2.99	2.51	-2.99	5.63
Nicaragua	4.90	-4.00	-5.04	-3.00	10.30
Nigeria	0.81	1.94	2.29	-1.79	3.65
Norway	1.81	1.40	1.93	-0.76	3.92
Other European Countries	2.42	3.55	2.62	-2.65	5.72
Pakistan	5.28	5.23	3.29	-0.38	5.57
Panama	5.36	3.90	4.31	-17.95	15.33
Paraguay	4.31	3.72	1.01	-0.90	4.20
Peru	2.51	3.99	2.60	-11.12	13.30
Philippines	6.67	6.20	5.72	-9.51	5.60
Poland	4.55	5.10	4.03	-2.72	5.67
Portugal	2.67	2.08	1.91	-7.59	4.88
Romania	6.99	4.13	4.00	-3.90	5.88
Russia	1.55	2.33	1.08	-3.06	4.70
Sadec	1.34	10.54	0.67	-9.38	-1.21
Saudi Arabia	-0.74	2.21	0.17	-4.15	3.24
Singapore	3.62	3.23	0.55	-5.39	7.61
Slovakia	3.40	4.12	2.60	-5.20	3.02
Slovenia	5.00	4.49	2.94	-5.53	8.11
Somalia	1.85	3.10	2.90	-1.50	1.98
South Africa	1.32	0.79	0.65	-6.96	4.91
South Korea	3.08	2.67	1.95	-0.96	4.02
South Pacific	2.75	1.36	3.26	-5.50	-6.59
South Sudan	-5.77	-1.93	0.87	-6.59	5.33
Spain	3.05	2.53	2.18	-10.96	5.13
Sri Lanka	3.11	3.02	2.72	-3.57	3.58
Sudan	3.19	-2.13	-2.62	-3.63	0.50
Sweden	2.40	2.34	0.94	-2.82	4.80
Switzerland	1.07	2.53	0.76	-2.98	3.72
Taiwan	2.79	2.63	2.03	3.11	6.28
Thailand	3.90	4.13	2.87	-6.09	1.57
Tunisia	1.90	2.48	1.51	-8.80	3.10
Turkey	7.05	2.57	0.25	1.79	10.99
Ukraine	2.52	3.29	2.99	-4.22	3.40
United Kingdom	1.79	1.40	1.23	-9.92	7.44
Uruguay	3.10	2.10	0.40	-5.70	4.40
USA	2.27	2.86	2.35	-3.50	5.68
Vietnam	6.81	7.08	6.50	2.91	2.58
West Africa	6.52	5.74	6.35	-6.53	5.00
Zimbabwe	3.01	3.45	-7.08	-8.00	6.34

Source: IMF. Some GDP growth rates have been updated since last year's publication.

9.5.2 - Average exchange rates in US$ 2017 to 2021 (%)

COUNTRY	2017	2018	2019	2020	2021
Argentina	16.56	28.12	48.50	70.63	95.09
Algeria	110.98	116.61	118.34	126.85	135.34
Armenia	482.72	490.16	486.54	501.15	501.35
Australia	1.30	1.34	1.44	1.45	1.33
Austria	0.89	0.85	0.89	0.88	0.84
Azerbaijan	1.70	1.70	1.70	1.70	1.70
Bangladesh	80.67	83.57	86.46	84.31	84.81
Belgium	0.89	0.85	0.89	0.88	0.84
Bolivia	6.86	6.86	6.86	6.86	6.86
Brazil	3.19	3.65	3.90	5.19	5.40
Bulgaria	1.73	1.66	1.74	1.71	1.65
Cambodia	4,059.17	4,044.95	4,055.25	4,109.00	4,154.18
Canada	1.30	1.30	1.33	1.34	1.25
Caribbean	1.00	1.00	1.00	1.00	1.00
Chile	648.85	641.22	680.09	792.16	759.07
China	6.76	6.62	6.75	6.90	6.45
Colombia	2,951.27	2,956.35	3,207.65	3,693.27	3,744.24
Costa Rica	562.87	587.96	597.74	584.94	620.85
Croatia	6.67	6.28	6.60	6.50	6.36
Cyprus	0.89	0.85	0.89	0.88	0.84
Czech Republic	23.65	21.73	22.70	23.21	21.68
Dem. Rep. Congo	1,403.59	1,612.50	1,687.53	1,921.37	1,960.57
Denmark	6.60	6.31	6.62	6.54	6.29
Dominican Republic	47.49	49.47	50.85	56.47	57.09
East Africa	1.00	1.00	1.00	1.00	1.00
Ecuador	1.00	1.00	1.00	1.00	1.00
Egypt	14.67	17.78	17.62	16.08	15.74
El Salvador	1.00	1.00	1.00	1.00	1.00
Estonia	0.89	0.85	0.89	0.88	0.84
Finland	0.89	0.85	0.89	0.88	0.84
France	0.89	0.85	0.89	0.88	0.85
GCC	3.67	3.67	3.67	3.67	3.67
Georgia	2.51	2.53	2.81	3.11	3.22
Germany	0.89	0.85	0.89	0.88	0.84
Ghana	4.35	4.59	5.19	5.60	5.80
Greece	0.89	0.85	0.89	0.88	0.84
Guatemala	7.45	7.52	7.79	7.72	7.74
Guyana	210.27	214.52	206.84	208.50	208.49
Honduras	23.49	24.07	24.99	24.90	24.40
Hong Kong	7.79	7.84	7.83	7.76	7.77
Hungary	250.74	270.21	266.00	308.00	298.23
Iceland	106.85	108.30	122.54	135.42	126.99
India	64.36	70.20	71.19	72.31	74.40
Indonesia	13,382.56	14,500.35	14,460.34	14,565.49	14,308.46
Iran	29,000.00	140,000.00	140,000.00	140,000.00	140,000.00
Iraq	1,182.00	1,182.00	1,182.00	1,190.81	1,450.00
Ireland	0.89	0.85	0.89	0.88	0.84
Israel	3.60	3.59	3.59	3.44	3.23
Italy	0.89	0.85	0.89	0.88	0.84
Jamaica	128.43	129.55	133.56	141.66	148.87
Japan	112.17	110.42	108.20	106.77	109.75
Kazakhstan	326.00	344.71	384.20	412.95	425.91
Kenya	103.44	101.28	102.11	106.00	109.47

COUNTRY	2017	2018	2019	2020	2021
Laos	8,244.18	8,273.75	8,581.95	9,055.12	9,753.06
Latvia	0.89	0.85	0.89	0.88	0.84
Lebanon	1,507.51	1,507.51	1,507.51	4,999.96	1,519.23
Levant	1.00	1.00	1.00	1.00	1.00
Lithuania	0.89	0.85	0.89	0.88	0.84
Luxembourg	0.89	0.85	0.89	0.88	0.84
Maghreb	10.00	10.00	10.00	10.00	10.00
Malaysia	4.30	4.04	4.18	4.18	4.14
Mexico	18.93	19.24	19.19	21.49	20.27
Mongolia	2,439.79	2,467.09	2,722.66	2,813.32	2,849.29
Mozambique	63.28	60.88	62.70	68.70	65.47
Myanmar	1,356.68	1,381.93	1,582.84	1,416.57	1,514.03
Netherlands	0.89	0.85	0.89	0.88	0.84
New Zealand	1.41	1.44	1.49	1.54	1.41
Nicaragua	30.05	31.55	33.14	34.35	35.20
Nigeria	305.37	325.00	325.00	359.21	398.77
Norway	8.27	8.13	8.76	9.42	8.59
Other European Countries	1.00	1.00	1.00	1.00	1.00
Pakistan	104.81	110.04	135.67	158.78	159.57
Panama	1.00	1.00	1.00	1.00	1.00
Paraguay	5,619.02	5,732.14	6,162.76	6,771.11	6,897.98
Peru	3.26	3.29	3.39	3.50	3.88
Philippines	50.40	52.66	52.50	49.62	49.25
Poland	3.78	3.61	3.99	3.90	3.86
Portugal	0.89	0.85	0.89	0.88	0.84
Romania	4.05	3.94	4.22	4.24	4.16
Russia	60.28	62.67	66.61	72.35	73.66
Sadec	1.00	1.00	1.00	1.00	1.00
Saudi Arabia	3.75	3.75	3.75	3.75	3.75
Singapore	1.38	1.35	1.37	1.38	1.34
Slovakia	0.89	0.85	0.89	0.88	0.84
Slovenia	0.89	0.85	0.89	0.88	0.84
Somalia	1.00	1.00	1.00	1.00	1.00
South Africa	13.32	13.24	14.27	16.46	14.78
South Korea	1,130.42	1,100.56	1,174.35	1,180.02	1,143.95
South Pacific	1.00	1.00	1.00	1.00	1.00
South Sudan	113.63	141.73	158.06	174.33	309.34
Spain	0.89	0.85	0.89	0.88	0.84
Sri Lanka	151.72	162.66	178.49	185.54	198.76
Sudan	15.75	40.11	65.21	150.37	425.61
Sweden	8.55	8.69	9.44	9.21	8.58
Switzerland	0.98	0.98	0.99	0.94	0.91
Taiwan	30.44	30.16	31.12	29.58	28.02
Thailand	33.93	33.49	31.98	31.29	31.53
Tunisia	2.42	2.65	2.95	2.81	2.79
Turkey	3.65	4.83	5.74	7.01	8.87
Ukraine	26.60	27.19	26.75	26.99	27.34
United Kingdom	0.78	0.75	0.80	0.78	0.73
Uruguay	29.28	30.71	33.38	39.82	43.52
USA	1.00	1.00	1.00	1.00	1.00
Vietnam	22,720.85	22,942.02	23,257.65	23,214.88	22,934.42
West Africa	194.16	194.16	194.16	194.16	194.16
Zimbabwe	1.25	2.04	7.60	51.82	88.57

Source: IMF. Source Lebanon 2021: Given the current state of volatility in the currency, information on the exchange rate for Lebanon has been obtained from ESOMAR's representative in the country. Costa Rica, Dem. Rep. Congo, Dominican Republic, Honduras, Iraq, Laos, Lebanon, Mozambique, Myanmar, Nicaragua, Somalia and South Sudan use US Dollar as currency to conduct business. For these countries we used an exchange rate of 1 to prepare calculations.

2017	One Euro = 1,12 US Dollar One US Dollar = 0,89 Euro	2018	One Euro = 1,18 US Dollar One US Dollar = 0,85 Euro	2019	One Euro = 1,12 US Dollar One US Dollar = 0,89 Euro
2020	One Euro = 1,14 US Dollar One US Dollar = 0,88 Euro	2021	One Euro = 1,18 US Dollar One US Dollar = 0,84 Euro		Source: IMF

9.5.3 - Inflation rates 2017 to 2021 (%)

COUNTRY	2017	2018	2019	2020	2021
Argentina	25.68	34.28	53.55	42.02	48.41
Algeria	5.59	4.27	1.95	2.42	7.23
Armenia	0.91	2.52	1.44	1.23	7.20
Australia	1.97	1.98	1.61	0.87	2.82
Austria	2.23	2.12	1.49	1.39	2.75
Azerbaijan	13.00	2.30	2.60	2.82	6.66
Bangladesh	5.68	5.56	5.69	5.65	5.56
Belgium	2.22	2.31	1.25	0.43	3.22
Bolivia	2.82	2.33	1.84	0.94	0.74
Brazil	3.45	3.67	3.73	3.21	8.30
Bulgaria	1.19	2.63	2.46	1.22	2.84
Cambodia	2.91	2.39	2.37	2.94	2.96
Canada	1.61	2.24	1.95	0.72	3.40
Caribbean	2.41	2.41	2.14	3.17	6.14
Chile	2.18	2.32	2.25	3.04	4.52
China	1.56	2.10	2.90	2.39	0.85
Colombia	4.31	3.24	3.52	2.52	3.50
Costa Rica	1.63	2.31	2.10	0.72	1.73
Croatia	1.10	1.50	0.77	0.26	2.61
Cyprus	0.68	0.78	0.56	-1.10	2.25
Czech Republic	2.43	2.16	2.86	3.16	3.84
Dem. Rep. Congo	41.50	29.30	4.77	11.35	8.99
Denmark	1.15	0.71	0.73	0.33	1.94
Dominican Republic	3.28	3.56	1.81	3.78	8.24
East Africa	16.18	18.37	13.81	40.70	80.14
Ecuador	0.42	-0.22	0.27	-0.34	0.13
Egypt	23.54	20.86	13.87	5.70	4.50
El Salvador	1.01	1.09	0.07	0.21	3.47
Estonia	3.72	3.41	2.27	-0.63	4.49
Finland	0.84	1.17	1.14	0.38	2.07
France	1.16	2.10	1.30	0.53	2.06
GCC	0.39	2.14	-1.00	0.97	2.14
Georgia	6.03	2.62	4.85	5.20	9.57
Germany	1.72	1.93	1.35	0.37	3.21
Ghana	12.37	9.84	7.21	9.89	9.98
Greece	1.14	0.77	0.52	-1.26	0.57
Guatemala	4.43	3.75	3.70	2.44	4.26
Guyana	2.06	1.30	2.09	0.72	5.11
Honduras	3.93	4.35	4.37	3.47	4.48
Hong Kong	1.48	2.41	2.87	0.33	1.57
Hungary	2.37	2.85	3.37	3.32	5.12
Iceland	1.76	2.68	3.01	2.85	4.45
India	3.60	3.48	4.54	6.20	5.52
Indonesia	3.81	3.20	2.82	2.03	1.56
Iran	9.89	31.17	41.06	36.50	40.13
Iraq	0.14	0.37	-0.20	0.57	6.04
Ireland	0.26	0.72	0.88	-0.46	2.41
Israel	0.24	0.82	0.84	-0.59	1.49
Italy	1.33	1.24	0.63	-0.15	1.94
Jamaica	4.38	3.73	3.91	5.21	5.90
Japan	0.47	0.98	0.48	-0.02	-0.26
Kazakhstan	7.43	6.03	5.24	6.80	8.00

COUNTRY	2017	2018	2019	2020	2021
Kenya	7.99	4.69	5.20	5.29	6.11
Laos	0.83	2.04	3.32	5.07	3.75
Latvia	2.89	2.55	2.75	0.08	3.24
Lebanon	4.48	6.07	2.90	88.18	224.39
Levant	3.97	5.38	1.78	27.21	64.90
Lithuania	3.72	2.53	2.24	1.06	4.63
Luxembourg	2.06	2.02	1.65	0.00	3.47
Maghreb	3.94	3.80	1.79	2.17	4.78
Malaysia	3.80	0.97	0.66	-1.14	2.48
Mexico	6.04	4.90	3.64	3.40	5.69
Mongolia	4.61	7.65	7.26	3.72	7.11
Mozambique	15.32	3.91	2.79	3.14	5.69
Myanmar	5.10	5.94	8.63	5.73	3.64
Netherlands	1.30	1.60	2.67	1.12	2.83
New Zealand	1.85	1.65	1.62	1.72	3.94
Nicaragua	3.85	4.97	5.38	3.71	4.92
Nigeria	16.50	12.09	11.40	13.25	16.95
Norway	1.88	2.77	2.17	1.29	3.48
Other European Countries	3.72	3.03	3.22	2.90	5.75
Pakistan	4.15	3.93	6.74	10.74	8.90
Panama	0.87	0.76	-0.36	-1.55	1.63
Paraguay	3.61	3.97	2.76	1.77	4.79
Peru	2.80	1.32	2.14	1.83	3.98
Philippines	3.18	5.21	2.48	2.64	3.93
Poland	1.98	1.60	2.31	3.40	5.10
Portugal	1.56	1.17	0.30	-0.12	0.94
Romania	1.34	4.63	3.83	2.65	5.05
Russia	3.67	2.88	4.47	3.38	6.69
Sadec	22.11	13.20	11.44	13.91	17.08
Saudi Arabia	-0.85	2.48	-1.21	3.44	3.06
Singapore	0.58	0.44	0.57	-0.18	2.31
Slovakia	1.31	2.53	2.77	2.01	2.83
Slovenia	1.43	1.74	1.63	-0.05	1.91
Somalia	-3.60	5.10	4.40	4.80	4.62
South Africa	5.27	4.62	4.13	3.27	4.55
South Korea	1.94	1.48	0.38	0.54	2.50
South Pacific	3.68	2.41	2.14	3.17	2.29
South Sudan	187.85	83.50	51.19	37.99	5.34
Spain	1.96	1.68	0.70	-0.32	3.09
Sri Lanka	6.54	4.27	4.30	4.56	5.96
Sudan	32.35	63.29	50.99	163.26	359.09
Sweden	1.87	2.04	1.70	0.66	2.65
Switzerland	0.53	0.93	0.36	-0.73	0.58
Taiwan	0.62	1.46	0.55	-0.17	1.82
Thailand	0.67	1.06	0.71	-0.85	1.23
Tunisia	5.32	7.31	6.72	5.69	5.71
Turkey	11.14	16.33	15.18	12.28	19.60
Ukraine	14.44	10.95	7.89	2.74	9.36
United Kingdom	2.68	2.48	1.79	0.85	2.59
Uruguay	6.22	7.61	7.88	9.76	7.75
USA	2.14	2.44	1.81	1.25	4.69
Vietnam	3.52	3.54	2.80	3.22	1.87
West Africa	4.10	3.66	2.92	4.59	5.15
Zimbabwe	1.25	10.61	255.29	557.21	98.55

Source: IMF. Source Somalia 2017: World Bank. Source Somalia 2018, 2019: African Economic Outlook from the African Development Bank. Source Somalia 2020: Somalia National Bureau of Statistics. Source Lebanon 2021: Given the current state of volatility in the currency, information on the inflation rate for Lebanon has been obtained from ESOMAR's representative in the country.

Thank you's

We would like to thank all those who contributed to Global Market Research 2022.
Links to each association and company can be found in the digital version of this report.

Expert interviewees

Joaquim Bretcha	Netquest
Simon Chadwick	Cambiar Consulting
Tom Hale	Momentive
Hana Huntova	SIMAR
Michalis A. Michael	DMR
Vanessa Oshima	Heart-Data
Ray Poynter	The Future Place

Survey respondents (R) - Representative / (A) - Association

Argentina	**Gastón Raffo**	CEIM - Chamber of Social and Market Research Companies (A)
	Alexia Aurelio	CEIM - Chamber of Social and Market Research Companies (A)
	Adrian Kohan (R)	Gentedemente
Armenia	**Aram Navasardyan (R)**	Armenian Marketing Association (A)
Australia	**Sarah Campbell**	ADIA - Australian Data and Insights Association (A)
	Jennifer Hodge	ADIA - Australian Data and Insights Association (A)
	George Zdanowicz	ADIA - Australian Data and Insights Association (A)
	Sally Joubert (R)	Luma Research
Austria	**Hermann Wasserbacher**	VdMI - Association of Market and Opinion Research Institutes in Austria (A)
	Alice Flament	VMÖ - Association of Market Researchers of Austria (A)
	Ansgar Löhner	VdMI - Association of Market and Opinion Research Institutes in Austria (A)
	Andrea Scheiblehner (R)	VMÖ - Association of Market Researchers of Austria (A)
Belgium	**Wim Hamaekers (R)**	One Inch Whale
	Katia Pallini (R)	Insites Consulting
	Luc Eeckhout	Phimedia
	Patrick Steinfort	BAM - Belgian Association of Marketing
	Ludovic Depoortere	Haystack Consulting
	Tom de Ruyck	Insites Consulting
Brazil	**Duilio Novaes**	ABEP - Brazilian Market Research Association (A)
	Amanda Reis	ABEP - Brazilian Market Research Association (A)
	Alessandra Frisso (R)	H2R Pesquisas Avançadas
Bulgaria	**Marchella Abrasheva (R)**	TNS - BBSS
	Juliana Ivanova	TNS - BBSS
APAC	**John Smurthwaite (R)**	ESOMAR Ambassador APAC
Canada	**John Tabone**	Canadian Research Insights Council (A)
Caribbean	**Anije Lambert**	PDC Research
Chile	**María Fernanda Correa**	AIM - Association of Market and Public Opinion Consultants and Researchers (A)
	Ramón Cavieres (R)	Activa Research S.A.
China	**Patrick Pun**	CMRA - China Marketing Research Association (A)
	Weng Ruiguang	CMRA - China Marketing Research Association (A)
	Andy Zhao	CMRA - China Marketing Research Association (A)
	Qian Fang (R)	Dynata
	Gloria Jun Zhang (R)	Dataway Horizon
Colombia	**Leandro Izquierdo**	ACEI - Colombian Ass. of Market Research and Public Opinion Companies (A)
	Sandra Triana (R)	YanHaas
Congo, Dem. Rep.	**Serge Mumbu Tshimanga**	Target SARL
Costa Rica	**Jorge Martín Frech**	MERCAPLAN Central America & Caribbean
Croatia	**Krešimir Žnidar (R)**	Prizma

Cyprus	**Lysandros Hadjilambrou (R)**	Conread
Czech Republic	**Hana Huntova (R)**	SIMAR - Association of Market Research and Public Opinion Agencies (A)
	Hana Svechotova	SIMAR - Association of Market Research and Public Opinion Agencies (A)
Denmark	**Jakob Dorph Broager**	Danish Industry (A)
	Kirsten Alkjærsig	Danish Industry (A)
	Jesper Platz (R)	DMA Research
Dominican Republic	**Jorge Martín Frech**	MERCAPLAN Central America & Caribbean
Egypt	**Nermeen Bedeir**	Kantar
	Ahmed Kaboh	Kantar
El Salvador	**Jorge Martín Frech**	MERCAPLAN Central America & Caribbean
Finland	**Jukka Rastas**	Palvelu Plus
France	**Céline Barbe**	SYNTEC Etude (A)
	David Ifrah	SYNTEC Etude (A)
	Ketty Faivre Tchang (R)	SNCF
	Isabelle Fabry (R)	Act Future
Georgia	**Nino Gogoladze (R)**	TV MR GE, Nielsen Television Audience Measurement's official licensee (A)
Germany	**Bettina Klumpe**	ADM e.V. - The Business Association for Market & Social Research (A)
	Bernd Wachter	ADM e.V. - The Business Association for Market & Social Research (A)
	Christina Uflacker	ADM e.V. - The Business Association for Market & Social Research (A)
	Christoph Welter (R)	Point Blank International
	Dirk Frank (R)	ISM Global Dynamics
Greece	**Angela Stathopoulou (R)**	Metron Analysis
Guatemala	**Christian Fabrizzio Andres Sabillon (R)**	MERCAPLAN Central America & Caribbean
Guyana	**Anije Lambert (R)**	PDC Research
Honduras	**Jorge Martín Frech (R)**	MERCAPLAN Central America & Caribbean
Hong Kong	**Chris Farquhar (R)**	MRSHK - The Market Research Society of Hong Kong (A)
Iceland	**Vilborg Helga Harðardóttir**	Ja
	Helga Birna Brynjólfsdóttir	Ja
India	**Mitali Chowhan**	MRSI - Market Research Society Of India (A)
	Sonali Kumar	MRSI - Market Research Society Of India (A)
	Sandeep Arora	Datamatics Global Services
	Priya Lobo (R)	Ormax Consultants
Indonesia	**Yanti Nisro (R)**	Deka Marketing Research
	Rhesa Yogashwara	PERPI - Indonesian Market Research Association (A)
Iran	**Afshin Vafadar**	Rahbar Bazaar
Iraq	**Munqith Dagher**	IIACSS
	Rand Daghir	IIACSS
Ireland	**Richard Colwell (R)**	RED C Research
	Luke Reaper	Banda
Italy	**Anna Reani**	Assirm - Italian Association of market research, social and opinion institutes (A)
	Constanza Donà	Assirm - Italian Association of market research, social and opinion institutes (A)
	Megan Oliva	Assirm - Italian Association of market research, social and opinion institutes (A)
	Alberto Stracuzzi (R)	Blogmeter
	Giulia Fabrizi (R)	Almar QR
Jamaica	**Larren Peart**	Blue Dot
Japan	**Hiroyuki Ichinose**	JMRA - Japan Marketing Research Association (A)
	Keiichi Kobayashi	JMRA - Japan Marketing Research Association (A)
	Shinichi Hosokawa (R)	GMO Research
Kazakhstan	**Natalya Ospanova**	Alvin Market
	Saniya Shyonkhaider	Alvin Market
Laos	**Chansada Souvanlasy**	Indochina Research
Lebanon	**Tarek Ammar (R)**	ARA Research and Consultancy
Lithuania	**Dovilė Končak**	LRSTA - Lithuanian Market and Social Research Association (A)
Malaysia	**John Smurthwaite (R)**	MRSM - Marketing Research Society Malaysia (A)
	Barry Ooi	Conversation Zone
Mexico	**Gabriela Alcalá Sáenz**	AMAI - Mexican Association of Marketing Research and Public Opinion Agencies (A)
	Olga Nelly Espinoza Villegas (R)	Acertiva

Mongolia	**Davaasuren Chuluunbat**	Mongolian Marketing Consulting Group
	Bumerdene Dulam (R)	Mongolian Marketing Consulting Group
Mozambique	**Natalie Forcier**	Forcier Consulting
Myanmar	**Marita Schimpl (R)**	MSR - Myanmar Survey Research
	Kyaw Hlaing	MSR - Myanmar Survey Research
Netherlands	**Wim van Slooten**	MOA - Expertise Center for Marketing Insights, Research and Analytics (A)
	Kjell Massen (R)	Haystack
	Wiepke van der Wal (R)	WiepkeWorks
New Zealand	**Claire Lloyd**	RANZ - Research Association New Zealand
	Susanna Baggaley	RANZ - Research Association New Zealand
	Horst Feldhaeuser	Infotools Ltd.
	Geoff Lowe (R)	Infotools Ltd.
Nicaragua	**Jorge Martín Frech**	MERCAPLAN Central America & Caribbean
Nigeria	**Paul Nnanwobu**	NiMRA - Nigeria Market Research Association (A)
	Seun Oyelaja	NiMRA - Nigeria Market Research Association (A)
	Josiah Ebhomenye (R)	Market Trends International Limited
Norway	**Pål Listuen (R)**	Polling & Statistics
Pakistan	**Quratulain Ibrahim (R)**	Nielsen Pakistan
Panama	**Jorge Martín Frech**	MERCAPLAN Central America & Caribbean
Peru	**Urpi Torrado (R)**	Datum Internacional
Philippines	**Melissa Carmela Baron**	MORES - Marketing and Opinion Research Society of the Philippines
	Jen Vidal	MORES - Marketing and Opinion Research Society of the Philippines
	Raul Esteban (R)	PSRC
Poland	**Piotr Chojnowski**	OFBOR - Polish Society of Market and Opinion Researchers (A)
	Izabela Rudak (R)	Maison & Partners
Portugal	**Graça Sá da Bandeira**	APODEMO - Portuguese Association of Market Research and Opinion Companies (A)
	Francisco Costa Pereira (R)	Carat
Romania	**Alina Serbanica (R)**	Ipsos
Russia	**Alexander Shashkin (R)**	OMI - Online Market Intelligence
	Olga Strelkova	OMI - Online Market Intelligence
Singapore	**Baxter Tan (R)**	MRSS - Market Research Society Singapore (A)
	Edward Lim Chee Wee	MRSS - Market Research Society Singapore (A)
Slovenia	**Janja Božič**	Mediana
Somalia	**Natalie Forcier**	Forcier Consulting
South Korea	**Bomi Park**	KORA - Korea Research Association (A)
	Jun Bin Park (R)	Kri
South Pacific	**Caz Tebbutt**	Tebbutt Research
South Sudan	**Natalie Forcier**	Forcier Consulting
Spain	**David Atanet**	IA - Insights & Analytics España (A)
	Javier Abella	IA - Insights & Analytics España (A)
	Juan Ramón Navarro	IA - Insights & Analytics España (A)
	Luis Pistoni (R)	ODEC
Sri Lanka	**Himalee Madurasinghe (R)**	Kantar LMRB
Sudan	**Mohamed Hamza**	Consulsat Market Research
Switzerland	**Stefan Klug (R)**	DemoSCOPE
	Nicole Siegrist	Swiss Data Insights Association
Taiwan	**Jennifer Liu (R)**	Insites Consulting Taiwan
Thailand	**Arpapat Boonrod (R)**	Kantar
	Chonnikan Waiyawut	Kantar
	Grant Bertoli	TMRS - Thailand Marketing Research Society
	Craig Griffin	FUEL Research & Consulting
Tunisia	**Nébil Belaam**	EMRHOD
Turkey	**Pinar Trana**	TUAD - Turkish Researchers' Association (A)
	Nur Uslu	TUAD - Turkish Researchers' Association (A)
	Elvan Oktar (R)	ERA Research & Consultancy

United Kingdom	**Debrah Harding**	MRS - The Market Research Society (A)
	David Cahn	Synygis
	Crispin Beale (R)	mTab
	Alexander Wheatley (R)	Lightspeed
	Lucy Davison (R)	Keen as Mustard Marketing
United States	**Melanie Courtright**	Insights Association (A)
	Cindy Neumann	Insights Association (A)
	Michael Brereton	Michigan State University
	Reg Baker	Collaborator
	Dan Fleetwood (R)	QuestionPro
	Dana Kim (R)	Highlight
	Joanna Lepore (R)	Mars Wrigley
	Joanne Robbibaro (R)	LRW
	Taylor Anderson (R)	Colgate-Palmolive
Uruguay	**Francisco Rodríguez Folle (R)**	Research Uruguay
Vietnam	**Richard Burrage (R)**	Cimigo

Special thanks also go to

Robert Heeg	Independent journalist
Jo Bowman	Independent journalist
Randy Giusto	Outsell
Steve Giglio	Outsell
Ned May	Outsell
Reg Baker	Collaborator
John Smurthwaite	ESOMAR APAC Ambassador
Suzy Young	WARC
Simone van Belkum	BDO
Rosalie Vester	BDO
Gijs van Blokland	DataIM
Koen Haverkamp	DataIM
Matthijs Hooghiemstra	Designer of the GMR

GMR 2022 Sounding Board

John Smurthwaite	ESOMAR APAC Ambassador
Reg Baker	Collaborator
Crispin Beale	mTab

Facilitated by

Marie-Agnes Mourot	ESOMAR - CFOO
Xabier Palacio	ESOMAR - Senior Manager Intelligence Unit
Ajitha Gopalakrishnan	ESOMAR - Junior Data Analyst

Glossary of terms

Primary research: 'new' or 'original' research that collects data from source in order to answer a question or gain more understanding of a specific issue.

Secondary research: compilation and analysis of previously collected or published information, which can be used to answer a question or gain more understanding of a specific issue.

Subcontracting outside the country: International subcontracting to companies outside the country/domestic market; that is, fieldwork outside of the country, subcontracted to other companies outside of the country.

Absolute growth: growth over time expressed in percentage terms, without adjusting for inflation. This report removes variability of exchange rates by calculating dollars with the average exchange rate of the latest year. In year T the exchange rate between the dollar and a local currency was US$ 1 = LC 7 and in year T+1 it was US$ 1 = LC 4. A turnover of LC 200 in year T is converted to US$ 50 and only then compared with the turnover reported for year T+1, for instance, LC 204, or US$ 51. The absolute growth from US$ 50 to US$ 51 is 2%.

Net growth: growth over time expressed in percentage terms, after adjusting for inflation. This report removes variability of exchange rates by calculating dollars with the average exchange rate of the latest year. In year T the exchange rate between the dollar and a local currency was US$ 1 = LC 7 and in year T+1 it was US$ 1 = LC 4. A turnover of LC 200 in year T is converted to US$ 50 and only then compared with the turnover reported for year T+1, for instance, LC 204, or US$ 51. The net growth from US$ 50 to US$ 51, with a 3% inflation is -0.97% [51/(50*(1+3%))-1].

Expected growth: Level of growth forecasted for the present year assuming no change in exchange rate (in line with absolute and net growth) and discounting the effects of inflation.

Subcontracting to companies outside the domestic market: Fieldwork, analysis or reporting being carried out outside of the country, subcontracted to other companies outside your country. Subcontracted services are removed from a country's total turnover to avoid double counting at a global level.

Domestic projects: Research projects with fieldwork conducted with research participants in the country in question.

Multi-country studies/international projects: Research projects with fieldwork conducted with research participants in at least one country besides the one in question.

Data gathering/processing: the process of gathering and measuring information on targeted variables in an established system, which then enables one to answer relevant questions and evaluate outcomes. Data collection is a component of research in all fields of study including physical and social sciences, humanities, and business. While methods vary by discipline, the emphasis on ensuring accurate and honest collection remains the same. The goal for all data collection is to capture quality evidence that allows analysis to lead to the formulation of convincing and credible answers to the questions that have been posed.

Active methods of research: ways to gather data which require a 'real-time', one-to-one personal interaction between researcher and respondent.

Passive methods of research: a less intrusive, less conscious recording of behaviour and generation of information, for the researcher to use to generate insights.

Established research: Long used methodologies, with a proven track record and thoroughly refined over time. This type of research includes mail, telephone CATI (including CATI to mobiles, i.e. a person-to-person interview, and IVR interviews), face-to-face (PAPI/CAPI/mobile assisted), online quantitative research (including CASI – "self-interviewing" – and online panel), mobile / smartphone quantitative research, audience measurement, F2F Group discussions/ focus groups, in-depth face to face interviews, ethnography.

Technology-enabled research: Includes methods that could not have existed without the advent of technology, such as online traffic/ web analytics (includes content tracking, digital tracking, CRM analytics and all advanced analytics), automated digital / electronic (includes retail audits, consumer household panels, location-based services, passive metering and log file processing), social media monitoring, online research communities (includes social media, in-depth interviews and online ethnography) and social media listening.

Reporting/Services: Step that usually follows data gathering, where it is firstly checked, then analysed (the reason why secondary analysis also falls within this step in the process), and is then presented to the client. Presentation forms can comprise presentations, workshops, dedicated reports, counselling on business processes, advisory services, etc. Areas of reporting include consulting firm research, advisory services, marketing reports/research, and all other secondary analysis (often by companies whose main business is not primary data collection, but which do offer insights, such as Gartner, Forrester, Mintel, Euromonitor, Deloitte, McKinsey & Co., PwC, etc.).

Domestic clients: Given the complexity and scope of certain projects, "domestic" is defined by those invoices paid from the home country.

International clients: Given the complexity and scope of certain projects, "international" is defined by those invoices paid from a different country.

Pro-bono: Research provided free, without charge, for example, work conducted free of charge for NGO's, charities, etc.

Quantitative research methods:

Objective measurements and the statistical, mathematical, or numerical analysis of data collected through polls, questionnaires, and surveys, or by manipulating pre-existing statistical data using computational techniques. Quantitative research focuses on gathering numerical data and generalizing it across groups of people or to explain a particular phenomenon.

- **Mail:** Respondents complete questionnaires on paper and return them via the mail.
- **Telephone CATI (including CATI to mobiles, i.e. a person-to-person interview):** CATI is a telephone surveying technique in which the interviewer follows a script provided by a software application.
- **IVR interviews:** Interactive voice recording interviews are a data collection technology that uses a recorded voice to ask survey questions by telephone, in place of live interviewers. Respondents enter their answers by pressing the buttons on the keypad of their touchtone telephone.
- **Face-to-face (PAPI/CAPI/mobile assisted):** PAPI, paper and pencil interview. CAPI, computer-assisted personal interviewing.

- **Online/mobile quantitative research (including CASI: "self-interviewing" and online panel):** CASI is a technique for survey data collection in which the respondent uses a computer to complete the survey questionnaire without an interviewer administering it to the respondent. Respondents may as well be reached via cell phone to participate in studies and/or participate in mobile phone surveys when connected to the Internet on their mobile device.

- **Audience measurement:** Measures how many people are in an audience, usually in relation to radio listenership and television viewership, but also in relation to newspaper and magazine readership.

- **Social media and communities:** Includes social media monitoring. Social media measurement, 'social media monitoring' or social listening is a way of computing popularity of a brand or company by extracting information from social media channels, such as blogs, news sites, micro-blogs such as Twitter, social networking sites, video/photo sharing websites, forums, message boards and user-generated content from time to time.

- **Online/web analytics:** measurement, collection, analysis and reporting of web data for purposes of understanding and optimizing web usage, as well as a tool for business and market research, and to assess and improve the effectiveness of a website. Web analytics provides information about the number of visitors to a website and the number of page views. It helps gauge traffic and popularity trends which is useful for market research.

- **Automated digital/electronic:** Includes retail audits, consumer household panels, location-based services, passive metering and log-file processing. Retail audits are studies of selected retail outlets performed by brand representatives or retail store employees for the purpose of collecting data about the health of the brand's products. A consumer household panel is a panel of households or individuals whose purchases are monitored on a continuous or ongoing basis. Passive metering applications provide a means for the industry to collect behavioural and usage data to augment current data sets without direct involvement from the user, other than acceptance of the download process. The types of data collected via passive metering vary by app, but typically include the number and types of apps downloaded on the device, the amount of time spent using those apps, location-based information, and other highly personal information. Log file analysis helps web masters gather statistics and key figures about the usage of a website or web server. Log file analysis is based on log files, which log all accesses to a web server.
- **Other:** Includes many syndicated services for which breakdowns are not available. This option may also be used when a country does not provide detailed breakdowns for certain types of categories and is prompted to aggregate them under this label.

Qualitative research methods:

Research with stress on the socially constructed nature of reality, the intimate relationship between the researcher and what is studied, and the situational constraints that shape inquiry. Such researchers emphasize the value-laden nature of inquiry. They seek answers to questions that stress how social experience is created and given meaning.

- **F2F Group discussions/Focus groups:** People from similar backgrounds or experiences to discuss a specific topic of interest.

- **In-depth face to face interviews:** Direct, one-on-one engagement with individual participants.

- **Online/mobile Qual (online groups, discussions, bulletin boards, mobile ethno, mobile diaries, photo boards):** Participants can conduct interviews over a period of time, and includes any type of research where

moderators task and interact with respondents using mobiles or smartphones as the primary medium.

- **Traditional Ethnography:** Understand the consumer in terms of cultural trends, lifestyle factors, attitudes and how social context influences product selection and usage

- **Online research communities:** Includes social media, in-depth interviews, online ethnography and social media listening. They allow qualitative research to be conducted efficiently and deeply online. In an online research community members (rather than respondents) talk to each other – they exchange ideas and discuss issues with each other. Unlike a panel this lets researchers observe how people interact, the language they use, and lets them raise the questions they want to ask, which results in richer responses.

- **Other:** Includes online observation techniques and semiotics for which breakdowns are not available. This option may also be used when a country does not provide detailed breakdowns for certain types of categories and is prompted to aggregate them under this label.

Research project type:

The process used to collect information and data for the purpose of making business decisions.

- **Market Measurement:** Syndicated or custom retail/consumer panel/surveys for market size and share, including online.

- **Market Modelling:** Includes market mix and media modelling.

- **New Product/Service Development:** Testing concepts, products, services, packaging, pricing, mix, etc. and volume forecasting.

- **Advertising Pre-Testing (Copy):** A specialised discipline of market research that evaluates the effectiveness of an advertisement based on consumer responses, feedback, and behaviour.

- **Advertising/Brand Tracking:** In-market research that monitors a brand's performance including brand and advertising awareness, product trial and usage, and attitudes about the brand versus their competition.

- **Media Audience/Research:** Viewing, listening, readership, including online and social media measurement.

- **Employee/ Satisfaction:** How satisfied or happy employees are with their jobs and their working environment.

- **CRM Systems/Customer Satisfaction:** Helps an organization to get an accurate and sharp feedback on their performance and through different customer opinions helps them to understand what customers feel about them.

- **Mystery Shopping:** Method used externally by market research companies, watchdog organizations, or internally by companies themselves to measure quality of service, or compliance with regulation, or to gather specific information about products and services.

- **Omnibus/Shared Cost Surveys:** Method of quantitative marketing research where data on a wide variety of subjects is collected during the same interview.

- **Usage & Attitude Studies:** Includes segmentation studies and motivational research.

- **Opinion Research/Polling:** Human research survey of public opinion from a particular sample.

- **User Experience (Ux) research:** The systematic investigation of users and their requirements, in order to add context and insight into the process of designing the user experience.

- **Non-profit Research:** The academic enterprise devoted to teaching and research on non-profit organizations and non-governmental organizations (NGOs), voluntary associations, voluntarism and voluntary action, philanthropy, civil society, and related activities.

- **Business-to-Business Studies not included above:** Types of studies that focus on business-related customers and decision-makers.

- **Other:** This option may be used when a country does not provide detailed breakdowns for certain types of categories and is prompted to aggregate them under this label.

Research design:

Framework of methods and techniques chosen by a researcher to combine various components of research in a reasonably logical manner so that the research problem is efficiently handled.

- **Ad hoc research:** Specifically designed to address a particular problem or issue.

- **Omnibus surveys:** A method of quantitative marketing research where data on a wide variety of subjects is collected during the same interview.

- **Panel research (including consumer panels, television audience measurement, retail audits and other continuous and non-continuous panel research):** A method for collecting data repeatedly, from a pre-recruited set of people.

- **Other syndicated research:**
  A research study which is conducted and funded by a market research firm but not for any specific client.

- **Other continuous:** (at regular frequency, including radio listenership, online web tracking, brand, advertising and customer satisfaction trackers, as well as "retainer" contracts covering (e.g.) 12 months of concept testing, innovation workshops etc.): undertaken to provide regular, ongoing data, information, and insights as opposed to ad hoc studies that are more project oriented and carried out at specific times for specific reasons.

- **Discretionary design through self-serve research platforms:** marketing, customer or personnel research using online research methods that any individual or organization, whether they be a professional researcher or not, carries out via special online research software, or online survey tool. The type of research design this option may include depends on the user's needs and, as such, cannot be integrated in any of the other categories in this section.

- **Other types of research:**
  This option may be used when a country does not provide detailed breakdowns for certain types of categories and is prompted to aggregate them under this label.

Client type:

Clients are arranged according to the ISIC international classification of the industry but adapted to the particularities of the Market Research industry. The terms in brackets refer to the nomenclature used in the past. They include the following:

- **Manufacturing (consumer non-durables):** Food, beverages and confectionery, tobacco products, OCT medicines, cosmetics and hygiene and Other consumer non-durables: textiles, wearing apparel, leather and related products, wood and of products of wood and cork except furniture, paper and paper products, printing and reproduction of recorded media, coke and refined petroleum products, rubber and plastics products.

- **Manufacturing (consumer durables):**
  Basic metals, fabricated metal products except machinery and equipment, computer, electronic and optical products, electrical equipment,

machinery and equipment, furniture, repair and installation of machinery and equipment, other non-metallic mineral products and other manufacturing.

- **Manufacturing (pharmaceutical):** Pharmaceuticals, medicinal chemical and botanical products.
- **Manufacturing (automotive):** Motor vehicles, trailers and semi-trailers and other transport equipment.
- **Utilities (electricity, gas, water and postal services):** Whether public or privately owned.
- **Wholesale and retail trade:** Including oil.
- **Information and communication (advertising):** Publishing activities
- **Information and communication (telecommunications and ICT):** Programming and broadcasting activities, telecommunications, computer programming, consultancy and related activities and information service activities.
- **Information and communication (media and broadcasting):** Motion picture, video and television programme production, sound recording and music publishing activities.
- **Financial and insurance activities:** Financial service activities, except insurance and pension funding, insurance, reinsurance and pension funding, except compulsory social security and activities auxiliary to financial service and insurance activities.
- **Public administration (Government):** Public administration and defence; compulsory social security.
- **Non-profit and NGO's:** Includes international organisations such as the World Bank and the UN.
- **Education:** research institutes that may include foundations or universities, as well as dedicated advisory, economic or specialist institutes that are (usually) endowed for doing research.
- **Tourism, travel and recreation:** Cultural activities, gambling and betting activities and sports activities, amusement and recreation activities.
- **Other:** Accommodation and food service activities, real estate activities, professional, scientific and technical activities, administrative and support service activities, transportation and storage, construction, water supply; sewerage, waste management and remediation activities, agriculture, forestry and fishing and mining and quarrying. This option may also be used when a country does not provide detailed breakdowns for certain types of categories and is prompted to aggregate them under this label.

Pass thru revenue: In its sizing efforts, Outsell does not include pass through revenue where reported in the financial statements of public companies. Pass through revenue is often work that comes from either another internal division or an external supplier or partner, and is transferred "at cost" to the client, meaning there is no mark-up or margin made off the work. Pass through revenue is found to be called out frequently by agency holding companies who also have research companies in their portfolio, and by ad-tech companies who pass revenue through their operations from media buying efforts done by agencies on behalf of their clients.

ESOMAR

1947

www.esomar.org