

GLOBAL MARKET RESEARCH 2013

An ESOMAR Industry Report
in cooperation with BDO Accountants & Advisors



ESOMAR
WORLD RESEARCH

ESOMAR is the essential organisation for encouraging, advancing and elevating market research worldwide.

With over 4900 members in 130 countries, ESOMAR's aim is to promote the value of market, social and opinion research in illuminating real issues and bringing about effective decision-making.

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.

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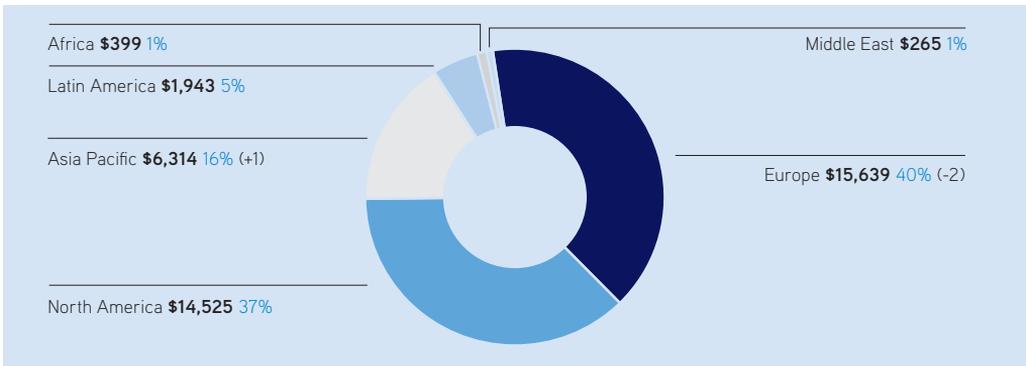
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1.1 THE TOP LINE

Global market research turnover increases to US \$39,084 million, representing a year-to-year increase of 3.2% and 0.7% after inflation. Fast-growing emerging markets buoyed the global market research industry and countered losses and sluggish performances elsewhere in 2012.

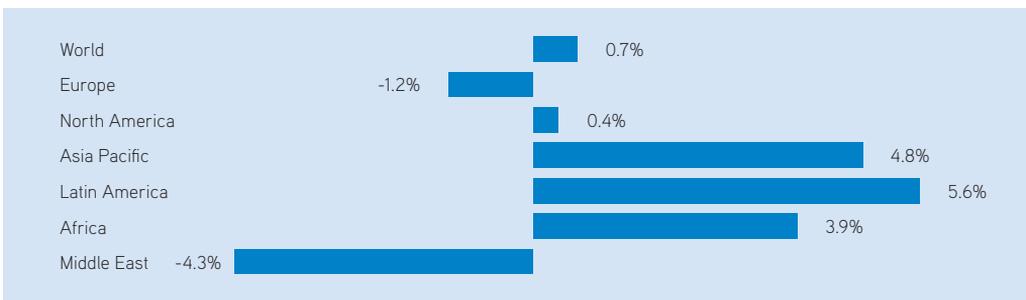
- Inclusion of Advisory Services adds a minimum of US \$5 billion to global market value.
- Market research turnover increases in 46 countries or sub-regions in 2012, and declines in 39.
- For the first time, Africa and the Middle East are reported as distinct regions.
- North America’s recovery continues, whilst Europe suffers another year of overall decline, with most of the EU 15 markets posting losses.
- In Latin America growth surges 5.6%, making it the best performing region for the research industry in 2012.
- Asia Pacific records another year of solid growth, thanks largely to a return to growth in Japan.
- Research revenues for Africa grow to US \$399 million, fuelled by a further increase in foreign investments.
- The Middle East sees turnover decline by 4.3%, reflecting continued unrest and international sanctions.

GLOBAL MARKET RESEARCH TURNOVER 2012 US \$39,084 million



ESOMAR estimates. Rounded figures presented. Percentage point changes in market share compared to 2011 are provided between brackets.

NET GROWTH RATES 2012 (adjusted for inflation)



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