GLOBAL MARKET RESEARCH 2015

An ESOMAR Industry Report

in cooperation with BDO Accountants & Advisors
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One year ago, participants to this survey felt that 2014 would see a big swing back to global growth. While those hopes did not materialise, and it is more a picture of stability for 2014, there remains guarded optimism – perhaps slightly tempered – as many companies do report an increase in market research spend from their clients in this current year. Let us hope that next year’s report reflects that optimism!

So, 2014 represents a picture of stability; revenues being generated a year ago have broadly been maintained, with some countries even reporting small gains in local currency terms. When inflationary impacts are factored into those reported levels of growth, however, the overall change is quite modest: world research turnover rose 0.1% in 2014, to US$ 43Bn.

Each issue of this report has traditionally marked a number of important developments in our profession, and this year is no different!

Firstly – and perhaps most importantly – while market growth is quite modest, the worldwide market value estimate takes a jump to US$ 43Bn, from US$ 40Bn reported last year. This is essentially due to the USA now being able to provide a (backdated) estimate which covers a much broader market, including research services that are conducted directly by clients (e.g. SurveyMonkey, Qualtrix, etc.) and market research analytics (e.g. the US proportion of work conducted by companies such as Acxiom, Cegedim, etc.):

Secondly, it is the Middle East that now assumes the mantle of fastest growing region, with a mention of note going to the GCC (Gulf Co-operation Council), which has consistently reported growth in each of the past five reports, so that its market is now almost 75% larger than reported in 2010.

Some of the other findings of note reported by this year’s survey are:

- China overtakes Japan as the biggest market in Asia, and becomes the 5th largest market globally;
- Brazil reports a ‘return to form’, and posts 6.6% growth;
- Despite the ‘bump up’ in the value estimate of the global market, Nielsen holds its 14% share, and Gartner moves into the Top 5 companies.

To complement the numbers, we again have a series of very insightful interviews from opinion leaders, CEO’s, new wave researchers, pollsters, associations and commentators, such that there is something for all of us to learn from reading about our market from a different perspective.

Do please let us have your thoughts and opinions on this report at: industrysurvey@esomar.org

But, we still need to do more to raise the perceived value of our profession – to legislators, to users and most importantly,
to our participants and consumers. The importance of research and insight to society, to governments and to business simply cannot be stressed enough, so please help us celebrate what we do, louder and farther in 2015 and beyond. It WILL make a difference!

Lastly (and as always), we owe a very large debt of gratitude to the many people who make this study possible: to the Sounding Board, the trade associations, industry experts, interviewees, ESOMAR representatives and our partner BDO, whose support is essential to the production of this report – thank you, one and all, for all of your input.

I would also like to make special mention of Larry (Laurence) Gold. Larry was an insightful and very capable commentator on the profession – often critical, but always supportive. He was also a regular contributor to the ESOMAR Global Market Research report, and his input was always invaluable.

Sadly, Larry passed away in March of this year, but his work on the valuation of the US market and the Top global companies was taken over by the AMA (American Marketing Association), working with CASRO (Council of American Survey Research Organisations); our grateful thanks go to both these organisations – and to Diane Bowers in particular, as our primary US liaison - for continuing the work, and for continuing to provide an important contribution to this report.

And finally, a very special word of thanks must also go to our tireless and dedicated partners - Harry Henry, Jorge Martin Frech, John Smurthwaite and Jo Bowman, whose time, efforts, regional expertise and guidance are critical to the success of the Global Market Research report.

I hope this report will continue to provide you with the authoritative review of the market it sets out to, and I look forward to any thoughts or suggestions on how we may further improve it to meet your needs.

With best regards,

Finn Raben
ESOMAR Director General
1. HIGHLIGHTS

Find here the latest regional developments in market research industry size, performance, consolidation, composition of client sectors and research methods.
GLOBAL MARKET RESEARCH 2015

The only global analysis of market research spend

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