GLOBAL MARKET RESEARCH 2016
An ESOMAR Industry Report
in cooperation with BDO Accountants & Advisors
ESOMAR is the essential organisation for encouraging, advancing and elevating market research worldwide.

With over 4,900 members in 130 countries, ESOMAR promotes 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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Looking back at previous reports, I was struck by the fact that in 2012 and 2013 – despite recessionary times – we were quite (overly?) optimistic about the following year. While that confidence did not translate then, the guarded optimism expressed in 2014 has become evident in 2015!

So, 2015 reports renewed growth: +3.5% before inflationary effects, and +2.2% after inflationary effects are factored in.

Promisingly, the vast majority of markets have reported growth, signalling a renewed demand for actionable information from research buyers. Exchange rates however, play a headline role in 2015, as the recorded expansion in the local research markets (and clearly demonstrated in local currency terms), is not always carried through to the conversion into US dollars and the adjustment for inflation.

This occasionally results in a counter-intuitive report of “growth”, but with a lower actual market value. This apparent contradiction is based on the fact that the report has traditionally “fixed” the exchange rate for prior year’s value, (to provide a consistent reference to previously published reports), and not used a common currency basis for comparison. This year, based on the number of reports we received about local market growth, we have included a selection of common currency comparisons in the graphics, to highlight the positive trends being reported.

We are also delighted to include additional detail on the analytics sector within this report, as well as the fact that we have expanded the country breakdown to include countries that we previously had no information on, specifically: Iceland, Mongolia, Somalia and Kazakhstan.

Incorporating the extended definition of our profession, our global market now records a value of US$ 68bn (67.9). The table above reflects the historical growth of the expanded market, with numbers adjusted to a common 2015 currency rate in order to neutralise the currency fluctuations witnessed in recent years. This adjustment is not used in the presentation of the data.
in chapter 2, where the industry sizing is based on the 2014 and 2015 exchange rates respectively.

Some of the other findings of note reported in this year’s report are:

- Europe recorded growth for the first time since the recession;
- Exchange rates and inflation in Latin America hit the region very hard;
- GfK moved back to fifth place in the rankings, relegating Gartner back to 6th.

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, all of whom detail many of the positives in our profession. The benefits and importance of research and insight to society, to government and to business simply cannot be stressed enough, so please help us to celebrate what we do, louder and farther in 2016 and beyond, it DOES 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 trade associations, industry experts, interviewees and ESOMAR representatives 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 extend a very special word of thanks to our tireless and dedicated partners - John Smurthwaite, Jo Bowman and Diane Bowers, whose time, efforts, regional expertise, guidance and contribution 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**

An overview of the latest regional trends and business developments within the industry, including market factors, spend by client and method, the big 5 and the outlook for 2016.