

Doing More with Less: The ESOMAR Surveys of Buyers of Insights

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What we did

Two surveys

September 2020 N=640

May 2021 N=802

Partners

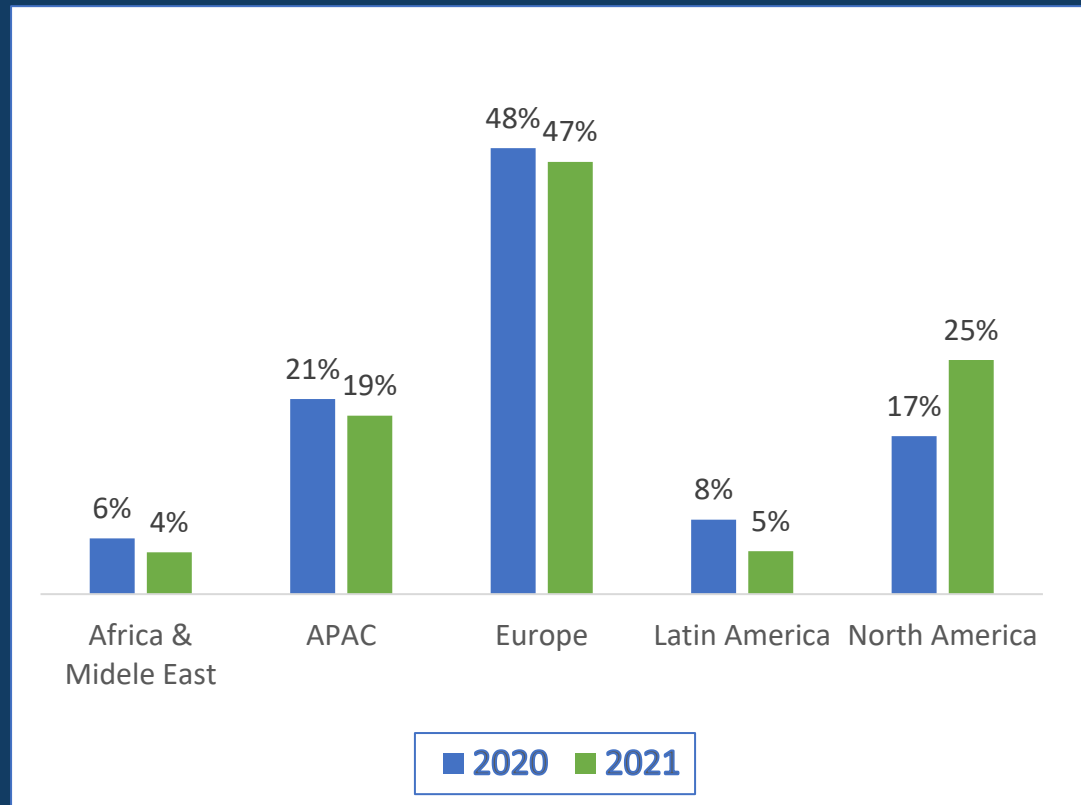
NewMR & Confrimit

Over two dozen organizations
worldwide

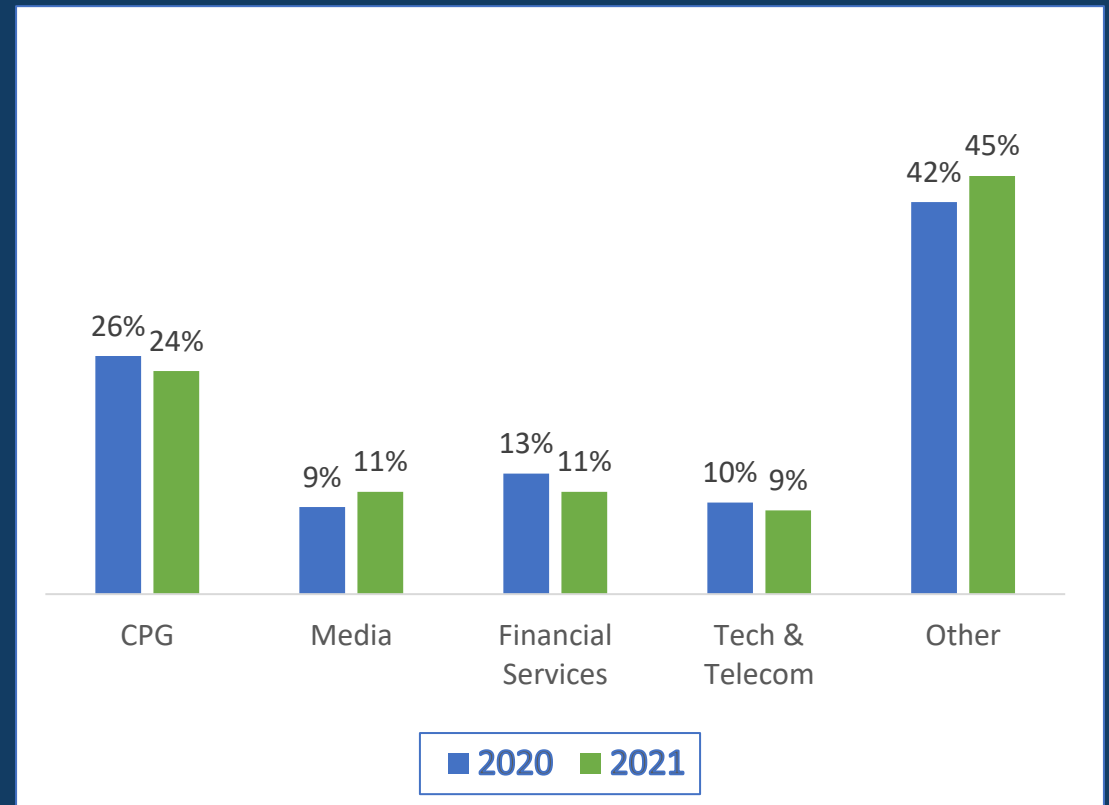
ABEP (Brazil), AEDEMO (Spain), AIM (Chile), AIMRO (Ireland), ARF (USA), ASSIRM (Italy), CEIM (Argentina), CEISMU (Uruguay), Confrimit, CRIC (Canada), CUBE (Belgium), ESOMAR, GreenBook, Infotools, Insight Management Academy (UK), Insights Association (USA), JMRA (Japan), NewMR, MOA (Netherlands), MRWeb, OFBOR (Poland), Potentiate, PTBRiO (Poland), PUMa (Germany), QRCA (USA), Quirks (USA), RANZ (New Zealand), SAIMO (Argentina), SORMA (Romania), The Research Society (Australia).

Sample Composition by Survey Wave

By Region

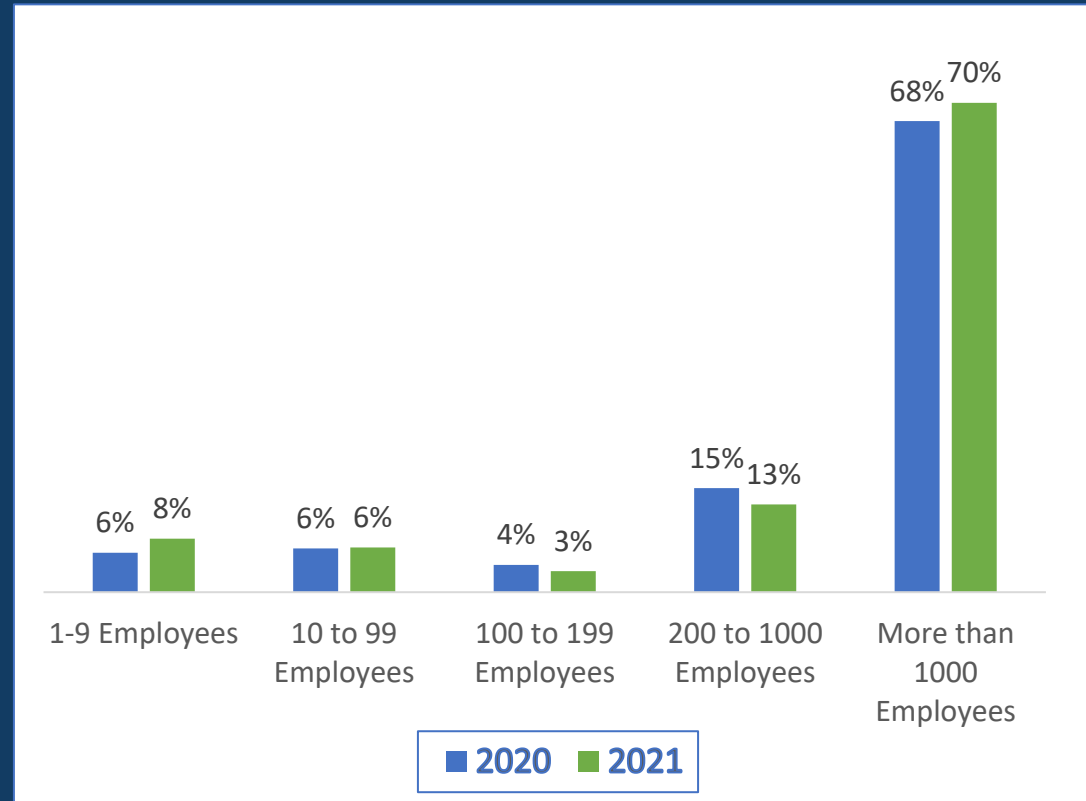


By Vertical



Sample Composition by Survey Wave

Company Size



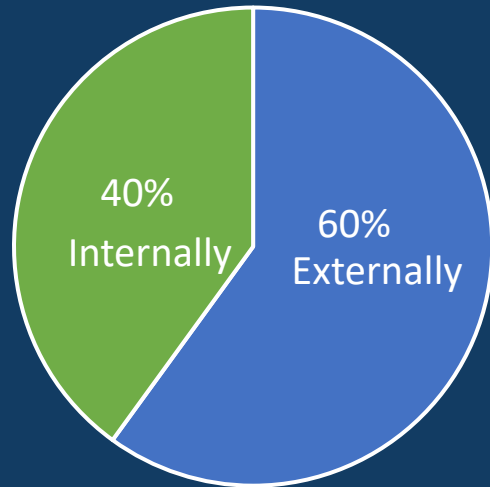


What we learned

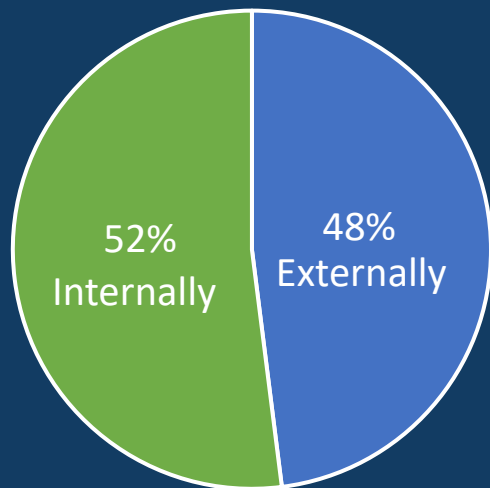
- More work is being done in-house.
 - Workloads and budgets are out of sync.
 - Primary data collection is still a major focus.
 - Platforms are a key enabler.
- Suppliers need to up their game.

What proportion of projects are being conducted internally vs externally?

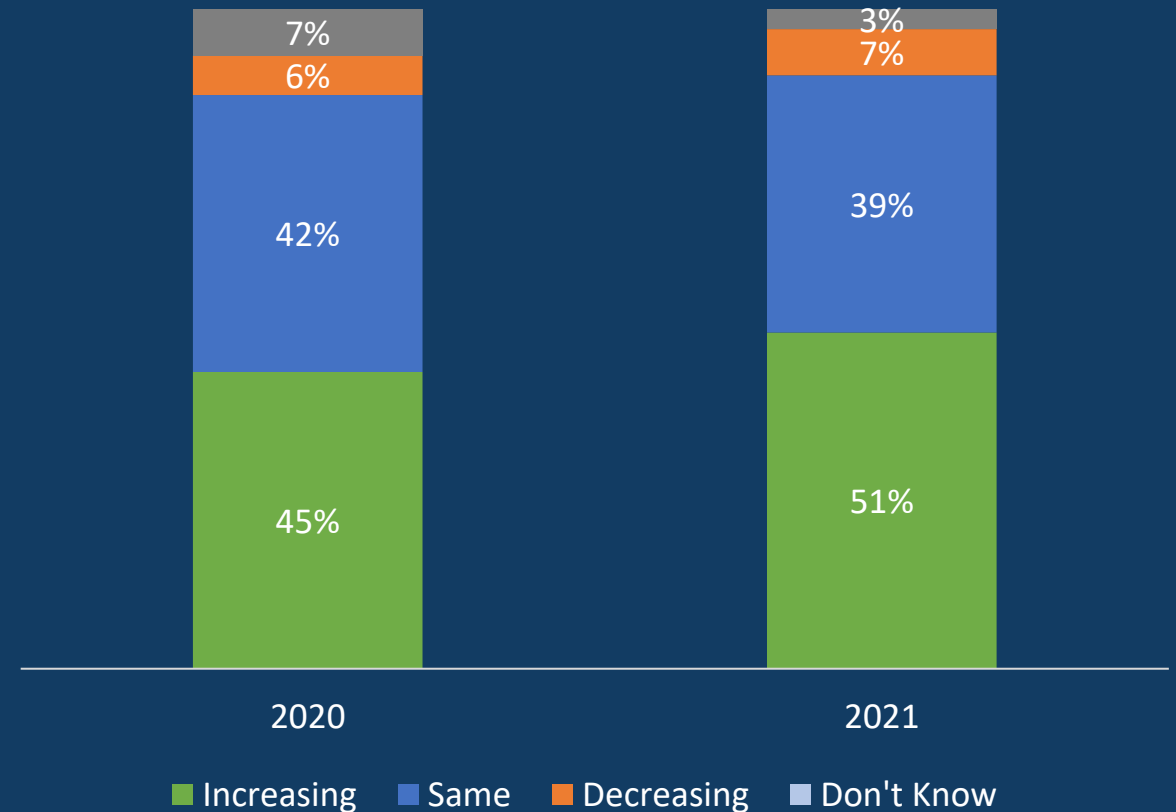
2020



2021

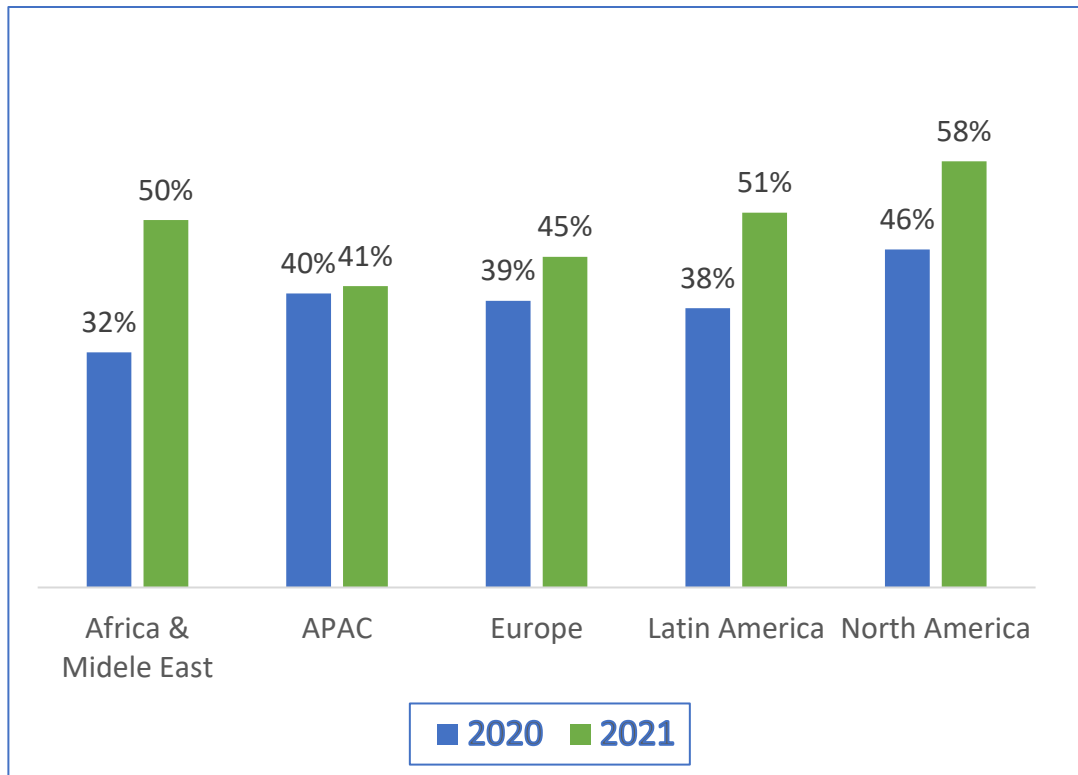


Is internal increasing, staying the same, or decreasing?

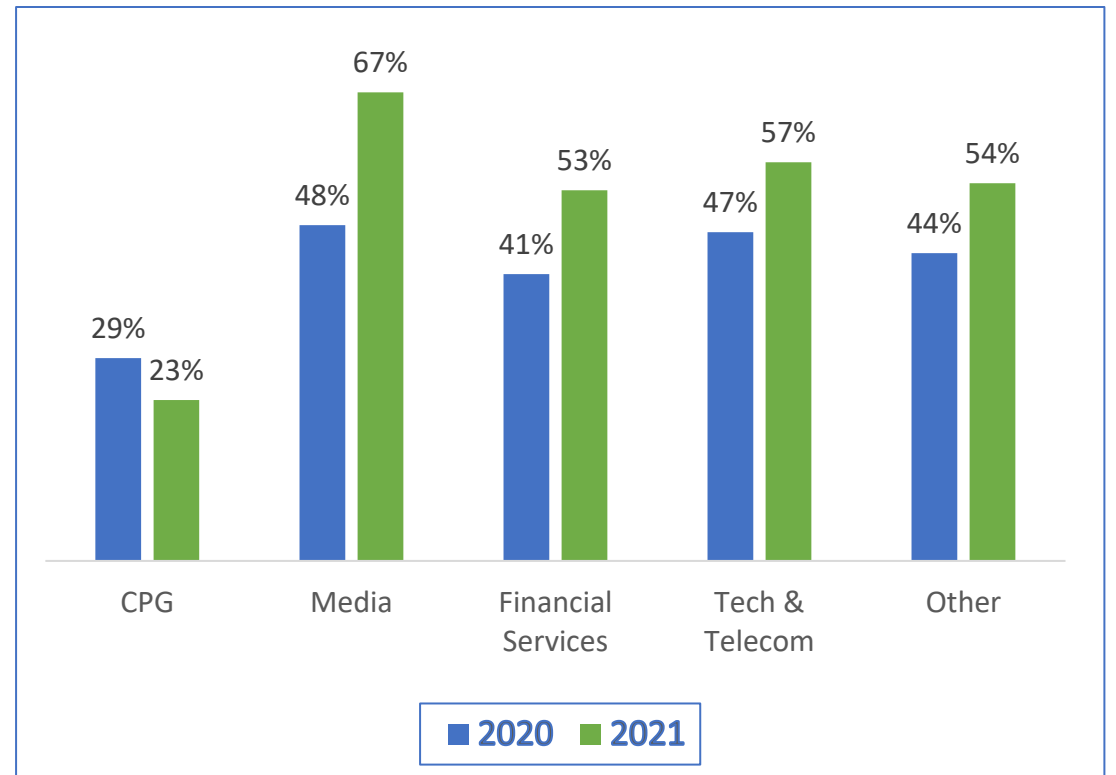


What proportion of projects are being conducted internally?

By Region



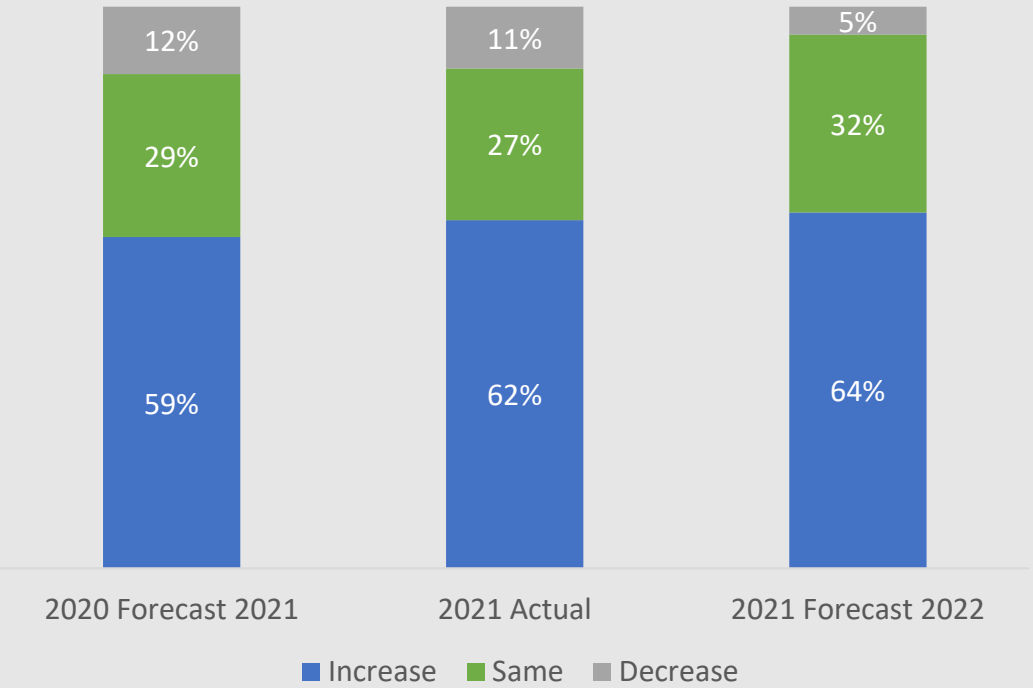
By Vertical



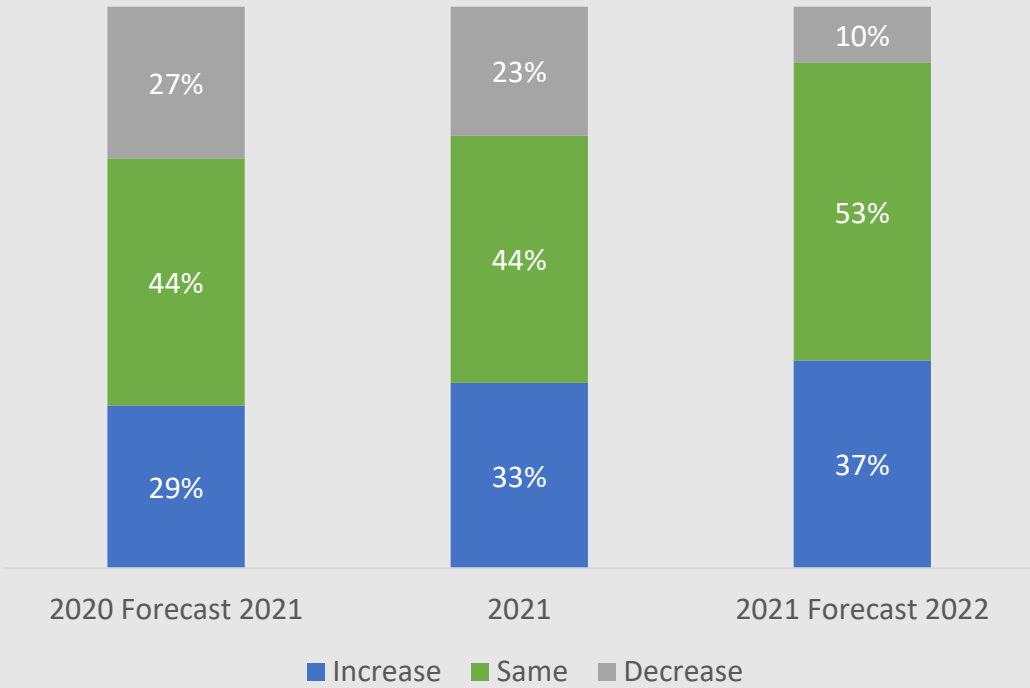
Workloads & Budgets



Volume of Projects



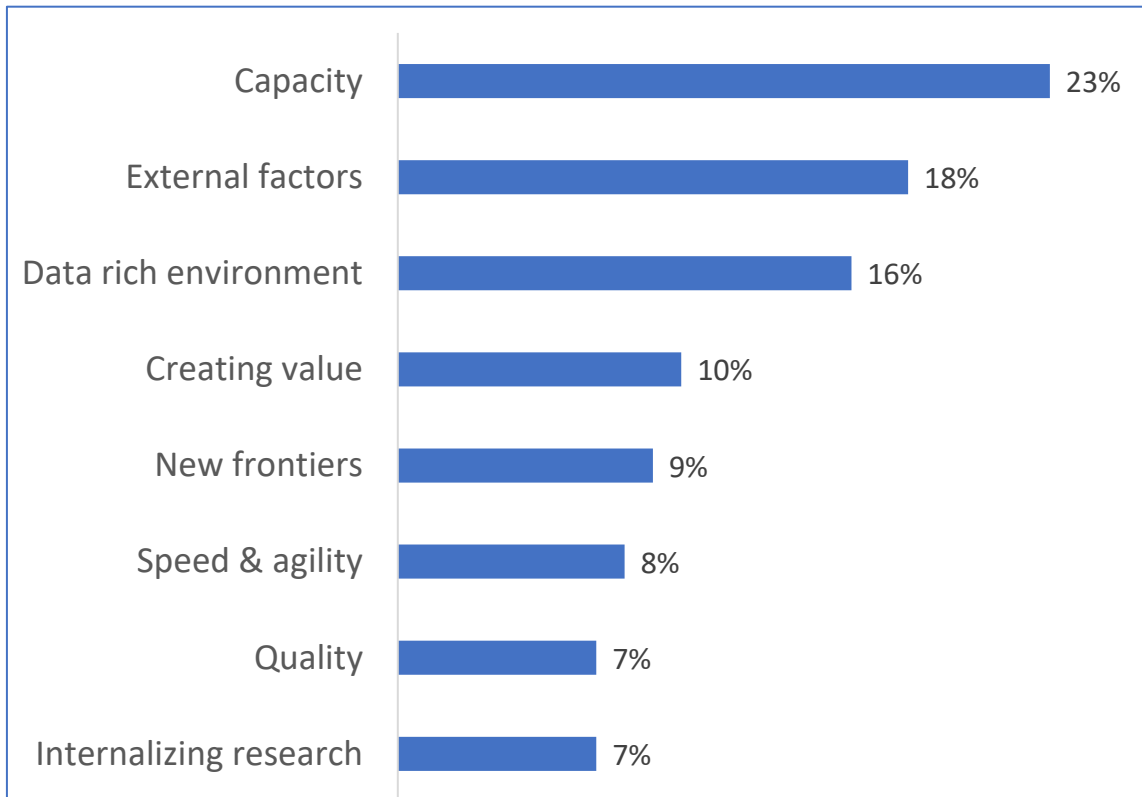
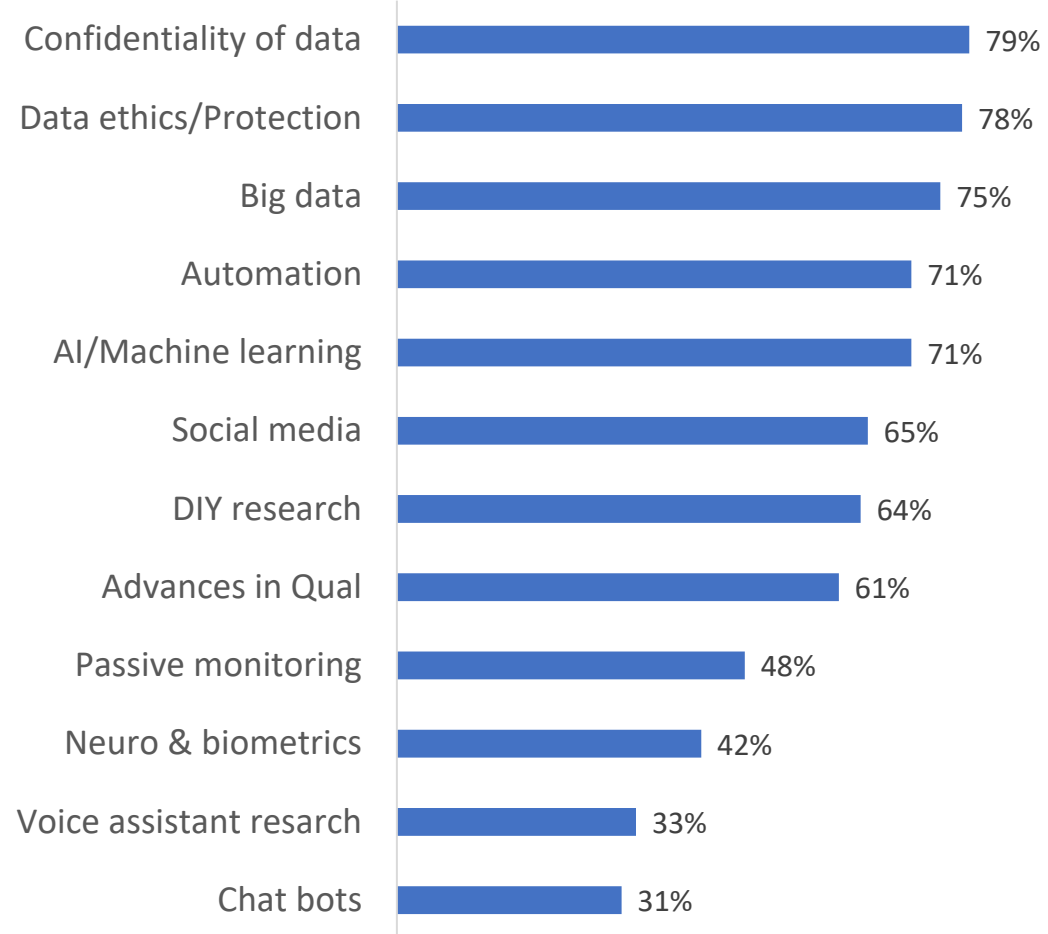
Budgets





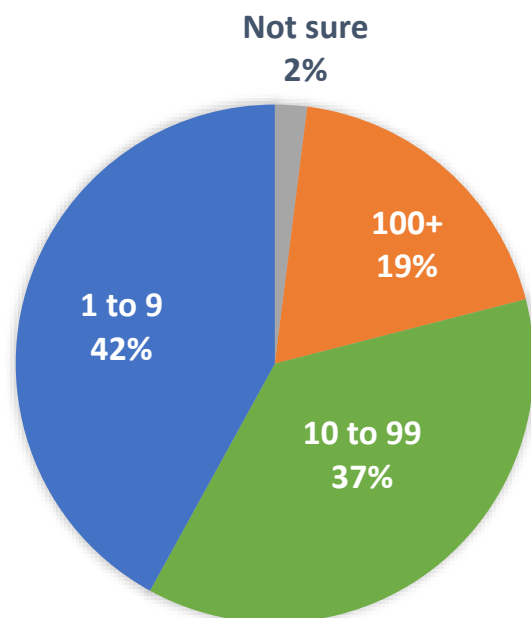
Reasons for budget changes for 2022	Increased	Decreased
<i>Base</i>	296	78
Performance reasons	15%	50%
Need for primary research	46%	15%
Need for analysing in-house databases	17%	1%
Need to expand expertise	14%	4%
Other	8%	29%

Issues & challenges over next 2 – 5 years?

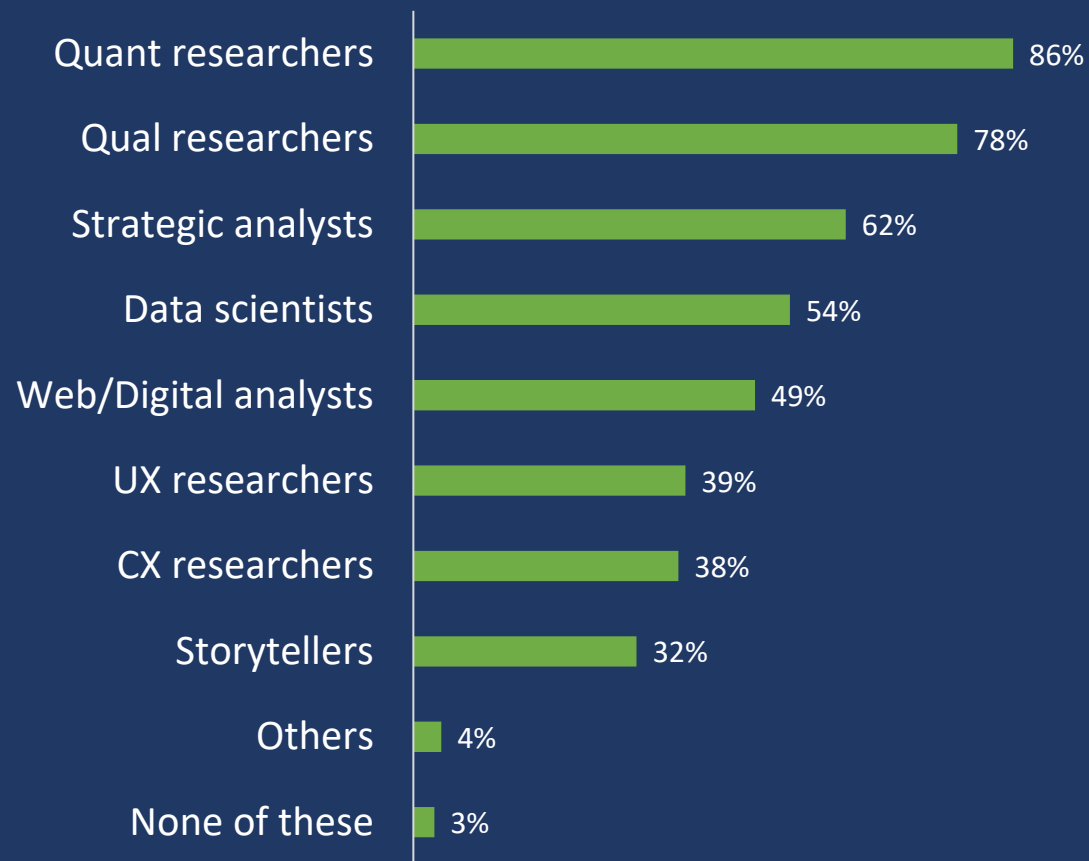


Headcount & Skills

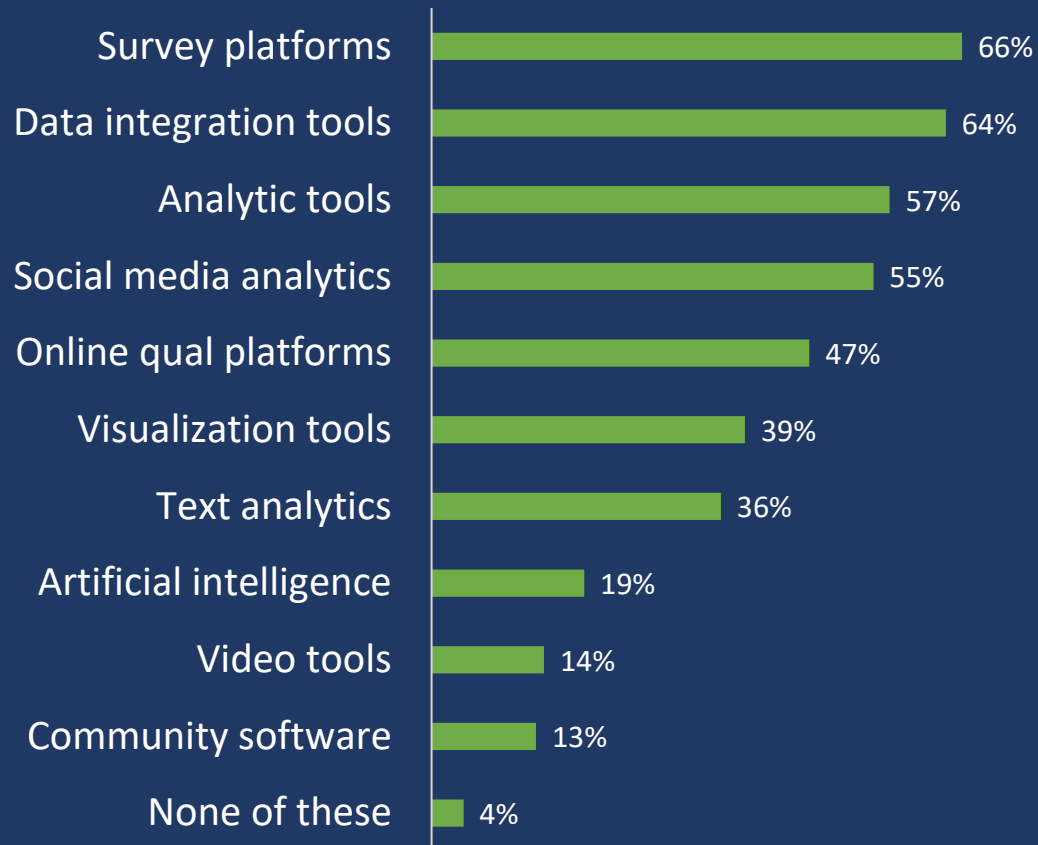
Insights headcount in 2021



Skills in your organization



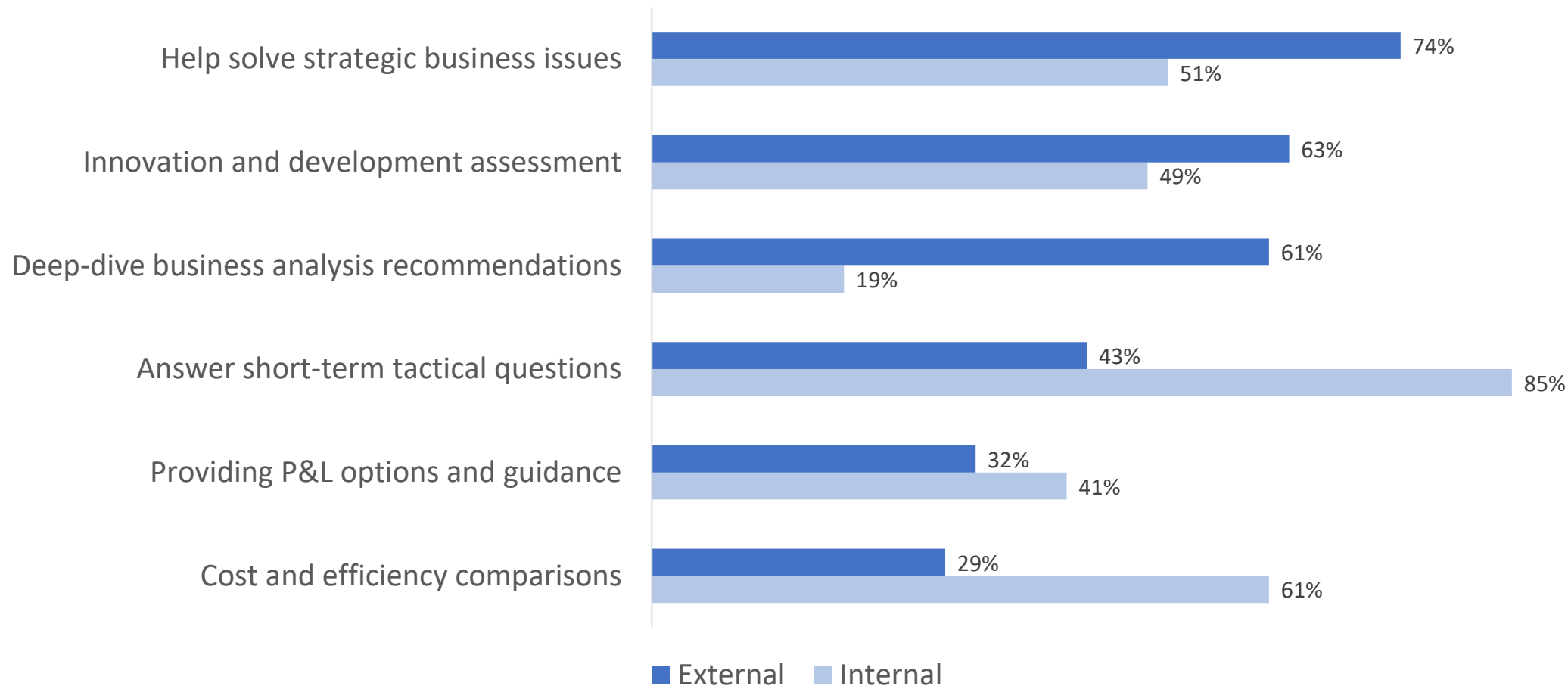
Technologies & Approaches Used Internally



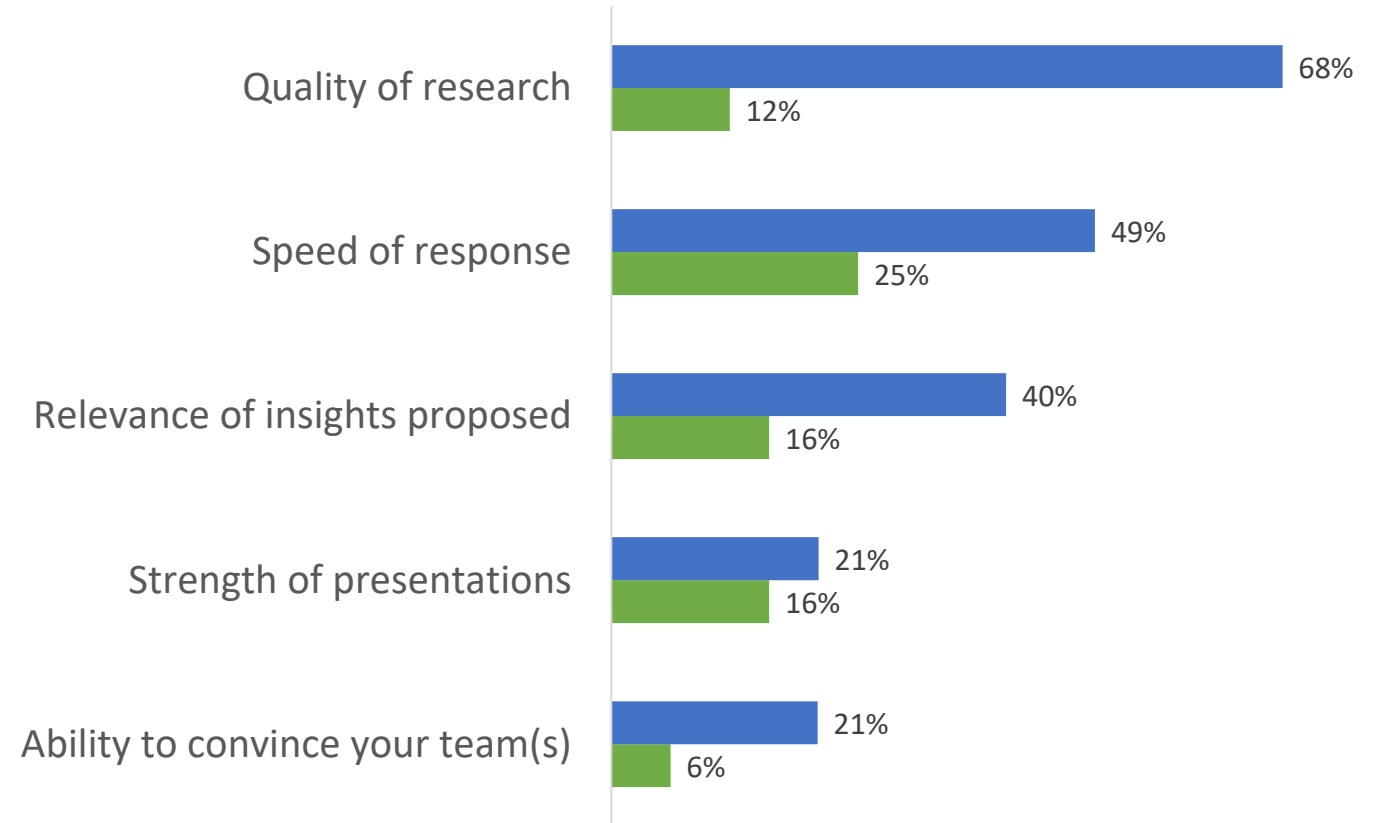
(In US\$ billion)	2018	2019	2020	2019/20 Growth (%)	Share of the total
Total Established Research	37.90	39.54	38.37	-3.0%	42.73%
<i>(Sample Panel Providers)</i>	<i>1.43</i>	<i>1.53</i>	<i>1.69</i>	<i>10.4%</i>	<i>1.88%</i>
Digital Data Analytics (MarTech)	13.43	15.51	16.84	8.6%	18.76%
Social Listening and Communities	4.60	5.31	5.80	9.1%	6.46%
Enterprise Feedback Management	1.42	1.73	1.88	8.6%	2.09%
Self-service Platforms	1.34	1.43	1.86	30.0%	2.08%
Total Tech-enabled Research	20.79	23.98	26.38	10.0%	29.38%
Industry Reports and Research	12.44	13.39	12.99	-3.0%	14.47%
Consulting Firms	10.20	11.24	11.85	5.4%	13.20%
Total Reporting	22.64	24.64	24.84	0.8%	27.67%
Total	81.33	88.16	89.79	1.8%	-

Source: Global Market Research 2021: An ESOMAR Industry Report (2021)

Balance of use for internal and external partners



Performance of external partners



■ Net rating ■ Net change

Net rating = Great% - Poor%

Net change = Improved% - Deteriorated%



Where do we go
from here?

Insights Managers

- Demonstrate the ROI of research
 - Get budgets and workload in sync
 - Skill up
 - Make thoughtful choices
-

Suppliers

- 50% of client work is not outsourced
- Keep sharpening the sword
- Insights, not just data
- "Think like a marketer"

THANKS FOR LISTENING

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