



Devonshire House
60 Goswell Road
London EC1M 7AD
Tel: 020 7566 3636
Fax: 020 7689 6220
Email: admin@bmra.org.uk
Web: www.bmra.org.uk

BMRA TURNOVER SUMMARY YEAR 1999

UK Market Research Industry Worth "At Least" £1 bn – Latest Results Findings

1999 was another good year for market research growth, according to the latest annual results from the British Market Research Association (BMRA), the trade body which represents UK market research companies.

The year-on-year growth of BMRA members' turnover was 7.1%. Says BMRA spokesperson and vice chairman of Research International, David Cahn, "the real growth of 5% is, admittedly, slower than the 1998 real growth figure of 8%. Nonetheless, that means that the market research sector itself is still increasing at more than twice the rate of inflation, and is now worth at least £1 billion."

International market research was relatively more buoyant than domestic, growing by 14% year-on-year (10% in 1998). UK domestic research grew by only 4.4% (11.7% in 1998). "However," points out Mr Cahn, "domestic research still accounts for over 70% of the total."

Looking at the top sectors by expenditure, the picture is similar to last year: foods, health and beauty, vehicle manufacture, media (broadcasting), financial, non-OTC pharmaceuticals and public services, still top the bill. Among these segments – which hold 5% or more of the total – the

most notable year-on-year increases are to be noted in vehicle and telecoms, up 19%, and in media and non-OTC pharmaceuticals, up 13%.

Taking all the segments of any size – over 1% of the market – the most striking increases were for media and marketing, up 97% and professional services, which rose by 30%. "This probably reflects the intense business activity in new media and internet-related areas," says Mr Cahn, "although this has yet to translate into widespread usage of the web for data collection."

The figures show that web or internet-based interviewing grew 20-fold, but was still very small in value terms, at just over 0.2% of the UK market.

Face-to-face fieldwork continued to be the biggest form of data collection, by both value and volume. However, the value of street interviewing – a minority form of face-to-face collection – declined by 17%.

"As to the future," concludes Mr Cahn, "there are definite signs of optimism in the market, in that members' forecast for sales growth in 2000 of 9%, is two points up on the actual 1999 outcome."

BMRA MEMBERS RANKED BY SALES TURNOVER

	1999	1999 vs. 1998	TOTAL Ranking	Domestic Ranking	International Ranking
Taylor Nelson Sofres plc	£101,650,000	5.3%	1	1	3
NOP Research Group Ltd	£70,261,577	1.5%	2	2	4
Research International Ltd	£60,401,000	-3.1%	3	4	1
Millward Brown International plc	£58,397,000	5.0%	4	3	2
NFO UK **	£38,767,464	12.6%	5	6	6
BMRB International	£35,964,446	13.0%	6	7	8
Ipsos-RSL Ltd	£34,314,000	18.6%	7	5	12
Information Resources	£24,718,514	26.5%	8	8	n/a
Maritz - TRBI Ltd	£24,050,900	24.7%	9	10	5
MORI (Market & Opinion Research International)	£21,229,708	7.9%	10	9	19
Martin Hamblin Group	£16,008,792	32.0%	11	12	7
The Added Value Company	£9,776,000	35.8%	12	20	10
Opinion Research Corporation International	£9,537,460	10.2%	13	11	16
ISIS Research plc	£9,026,026	4.3%	14	41	9
Simon Godfrey Associates Ltd	£8,244,000	-9.2%	15	22	11
Hauck Research International	£7,849,861	47.3%	16	16	15
Hall & Partners	£7,225,000	18.8%	17	17	20

	1999	1999 vs. 1998	TOTAL Ranking	Domestic Ranking	International Ranking
Market Research Solutions Ltd	£5,946,386	3.8%	18	14	38
Sample Surveys Group	£5,727,961	10.2%	19	13	64
Business & Market Research Ltd	£5,514,000	0.2%	20	15	43
ASE	£5,388,248	22.5%	21	77	13
Marketing Sciences	£5,365,461	-1.4%	22	21	22
Continental Research	£5,143,261	11.7%	23	18	56
FDS International Ltd	£4,936,726	5.6%	24	19	49
GFK Great Britain Ltd	£4,706,607	11.6%	25	53	14
Pegram Walters Group	£4,215,625	-27.2%	26	27	25
Romtec	£4,101,237	5.1%	27	29	23
Hi-Tech Marketing (now Harte Hanks)	£4,100,000	54.7%	28	25	27
Business Development Research Consultants Ltd	£4,067,710	1.8%	29	35	21
Survey & Marketing Services	£3,953,000	-28.8%	30	30	24
Morpace International Ltd	£3,583,700	12.7%	31	54	17
RDSi	£3,563,806	47.3%	32	28	28
DVL Smith Ltd	£3,064,713	28.0%	33	26	42
MMR Product & Concept Research	£3,032,000	16.3%	34	32	31
Quaestor Research & Marketing Strategists Ltd	£3,001,000	32.4%	35	23	n/a
Retail Marketing In-Store Services Ltd	£2,979,000	-15.6%	36	24	n/a
Flamingo	£2,900,000	13.7%	37	64	18
Sadek Wynberg Research Ltd	£2,827,883	-1.1%	38	31	37
Facts International Ltd	£2,781,491	15.3%	39	38	29
On Line Telephone Services	£2,509,000	16.1%	40	36	35
ESA Market Research Ltd	£2,249,263	0.3%	41	33	n/a
Leapfrog Research & Planning Ltd	£2,238,121	3.2%	42	34	63
Research in Focus Ltd	£2,156,997	-18.2%	43	44	32
Consensus Research Ltd	£2,074,000	-0.3%	44	37	53
Infocorp Ltd	£1,889,568	28.1%	45	39	57
Market Measures	£1,716,625	-5.4%	46	45	40
Parker Tanner	£1,693,082	-6.7%	47	43	45
Accent Marketing & Research Ltd	£1,612,013	1.6%	48	40	n/a
Kudos Research	£1,601,000	21.3%	49	81	26
RSSL	£1,600,000	n/a	50	n/a	n/a
Quota Search Ltd	£1,469,831	n/a	51	42	n/a
Maven Management Ltd	£1,389,076	17.0%	52	46	58
Context Research International Ltd	£1,361,000	2.3%	53	50	44
Scantel International	£1,330,000	7.4%	54	57	34
Jones Rhodes Associates Ltd	£1,295,220	-9.4%	55	47	n/a
Market Probe Europe Ltd	£1,200,000	275.0%	56	60	36
Consumer Insight	£1,180,000	-7.5%	57	48	n/a
Keith Gorton Services	£1,159,112	10.0%	58	51	51
Abacus Research Ltd	£1,116,387	9.9%	59	49	n/a
Albermarle Marketing Research Ltd	£1,103,000	9.1%	60	52	48
Banner Corporation plc	£1,098,000	2.7%	61	79	30
Marketpower Ltd	£950,559	-7.4%	62	55	55
Cambridge Market Research	£843,948	8.9%	63	56	n/a
IDA	£837,333	6.1%	64	58	54
European Data & Research Ltd	£790,010	29.1%	65	91	33
RBA Research	£740,900	9.9%	66	59	n/a
Kadence UK Ltd	£717,966	-15.4%	67	62	52
Consumer Profile Ltd	£710,000	9.2%	68	71	47
Westcombe Business Research Ltd	£682,488	12.7%	69	78	41
Chart Track Ltd	£629,000	19.4%	70	72	50
Wood Holmes	£622,523	2.7%	71	61	n/a
React Surveys Ltd	£601,926	2.0%	72	63	n/a
Foodservice Intelligence Ltd	£600,000	13.4%	73	66	62
Strategic Marketing Research	£580,000	153.0%	74	65	n/a
Select Research	£550,000	-5.3%	75	67	n/a
The Cog	£545,947	31.4%	76	68	n/a
Parker Tanner Woodham Ltd	£543,710	28.2%	77	69	n/a
Topflight Research Ltd	£533,000	-7.0%	78	70	n/a
Carrick James Market Research	£513,251	7.6%	79	73	60
RCU Ltd	£460,244	23.3%	80	74	n/a
Roper Starch Worldwide	£457,133	-28.3%	81	92	39

	1999	1999 vs. 1998	TOTAL Ranking	Domestic Ranking	International Ranking
Adsearch	£416,000	4.0%	82	75	n/a
DPA Research Ltd	£389,777	0.1%	83	76	n/a
I M International	£305,800	-4.4%	84	88	46
Creative Research Ltd	£294,667	-15.3%	85	80	n/a
Clark Chapman	£287,000	10.8%	86	82	n/a
Information Research Network	£281,976	5.1%	87	83	65
Trade Research by Hoefkens Ltd	£272,369	13.8%	88	84	61
Chambers & Stoll	£186,667	-23.8%	89	85	n/a
John Ardern Research	£182,000	-32.3%	90	86	n/a
Lambda Data Processing	£180,000	0.0%	91	87	59
OMI Ltd	£109,768	-29.4%	92	89	n/a
Sensus Research	£108,467	-32.1%	93	90	n/a

** comprising

Infratest Burke Group	£17,726,000
MBL Group plc	£18,617,464
City Research Group plc	£2,424,000

Estimated value of UK market for market research **c.£980,000,000**
Sales Turnover of all BMRA members (n = 219) **£713,800,000**

Overall Growth **7.1%**
Domestic Growth **4.4%**
International Growth **14.3%**

% share of domestic turnover **70.5%**
% share of international turnover **29.5%**

Forecast Growth Next Year **9.0%** -28.2%
Permanent Salaried Staff **5,233** -7.2%

TURNOVER BY SECTOR

Companies reporting year-on year**

	Qualitative		Quantitative		All		
	Value £'000s	Yr/Yr % 1999 v 1998	Value £'000s	Yr/Yr % 1999 v 1998	Value £'000s	Yr/Yr % 1999 v 1998	
Consumer							
Market Measurement	£1,475	-18.1%	£102,150	17.6%	£103,625	20.4%	16.9%
New Product development/concept testing	£25,798	19.5%	£61,262	6.8%	£87,060	17.1%	10.3%
Ad or brand awareness monitoring/tracking	£581	-41.0%	£66,913	13.8%	£67,494	13.3%	12.9%
Customer Satisfaction (inc Mystery Shopping)	£4,016	-0.5%	£44,687	-8.3%	£48,703	9.6%	7.7%
Usage and Attitude Studies	£5,502	-13.3%	£26,285	-4.9%	£31,787	6.3%	-6.5%
Media Research & evaluation	£756	55.4%	£20,577	16.1%	£21,333	4.2%	17.2%
Advertising developing and pre-testing	£6,814	3.1%	£14,259	-4.1%	£21,074	4.1%	-1.9%
Brand/corporate reputation	£3,025	52.5%	£16,192	22.5%	£19,217	3.8%	26.4%
Social Surveys for central/local government	£1,683	33.7%	£12,705	-1.2%	£14,388	2.8%	1.9%
Other Type of Research	£3,611	8.1%	£8,986	3.0%	£12,596	2.5%	4.4%
Omnibus Studies	£40	-59.3%	£12,235	0.6%	£12,276	2.4%	0.2%
Employee Relations/recruitment	£586	22.3%	£3,128	12.0%	£3,713	0.7%	13.5%
Opinion Research about political, social, religious, or moral issues	£540	-64.2%	£3,058	18.1%	£3,598	0.7%	-12.2%
Retailer location & development	£605	71.0%	£647	-28.2%	£1,252	0.2%	-0.2%
Total	£55,032	8.2%	£393,084	7.6%	£448,116	88.2%	7.7%
Non-Consumer							
Doctors/Dentists, vets, nurses etc	£4,688	-13.8%	£13,483	-2.4%	£18,171	3.6%	-5.6%
IT/DP/Telecoms managers	£1,467	-13.6%	£6,530	-6.4%	£7,998	1.6%	-7.9%
Retailers/Wholesalers/dealers/merchants	£1,387	-14.0%	£5,791	-20.3%	£7,178	1.4%	19.2%
The City/financial services/banking	£1,443	-6.7%	£5,335	3.4%	£6,778	1.3%	1.1%
Other business/industrial	£2,005	0.5%	£18,064	4.6%	£20,069	3.9%	4.2%
Total	£10,990	-10.6%	£49,203	-2.6%	£60,192	11.8%	4.1%

** these data are based only on those companies who reported this information for both years. Hence the total is less than the total turnover reported elsewhere.

TURNOVER BY NATURE OF CLIENT

	1999 Value £'000s	% of 1999 total	Yr/Yr % change 1998 v 1999
Food	£61,442	10.4%	4.9%
Health & Beauty	£46,731	7.9%	19.6%
Vehicle Manufacturers	£40,951	6.9%	7.5%
Media (Broadcasting)	£40,279	6.8%	12.6%
Financial	£38,908	6.6%	-0.9%
Non OTC Pharmaceutical	£38,059	6.4%	13.1%
Public Services	£29,669	5.0%	-12.1%
Retailers	£29,212	4.9%	-0.2%
Telecommunications	£24,040	4.1%	19.1%
Government	£23,787	4.0%	10.3%
Alcoholic Drinks	£20,375	3.5%	5.2%
Travel & Transport Companies	£17,152	2.9%	6.0%
Household products	£16,838	2.9%	-9.4%
Advertising Agencies	£14,079	2.4%	22.6%
Professional Services	£12,036	2.0%	30.3%
Soft Drinks	£10,820	1.8%	25.2%
Media & Marketing	£8,580	1.5%	97.4%
IT	£8,531	1.4%	-10.4%
Household Durables	£8,084	1.4%	27.5%
Business/Industrial	£7,817	1.3%	-38.8%
Leisure & Tourism	£7,128	1.2%	-1.9%
Printing & Publishing	£6,193	1.0%	16.9%
Clothing (inc Footwear) & Textiles	£4,549	0.8%	-0.5%
Tobacco	£3,362	0.6%	-2.9%
Oil Companies	£3,119	0.5%	-45.2%
Education	£1,548	0.3%	84.2%
Distribution & Logistics	£767	0.1%	-23.7%
Property & Construction	£668	0.1%	166.8%
Office Equipment	£435	0.1%	-13.3%
Planning & Environment	£122	0.0%	-80.0%
Purchasing	£0	0.0%	-100.0%
Other Sources	£40,495	6.9%	29.1%
Other Consumer	£12,430	2.1%	-2.8%
Other BMRA Companies	£12,042	2.0%	43.3%

TURNOVER BY METHOD

	1999 Value £'000s	% of 1999 total	Yr/Yr % change 1998 v 1999
Retail Audit	£26,563	4.5%	21.7%
Consumer Panel: Total	£49,226	8.3%	20.1%
Consumer Panels Continuous	£47,717	8.1%	19.5%
Consumer Panels Intermittent	£60	0.0%	-18.9%
Consumer Panels Access	£1,449	0.2%	3.4%
Discussion Group	£52,003	8.8%	4.7%
Depth Interviews	£21,525	3.6%	11.7%
Hall/central location test	£45,632	7.7%	-3.8%
Street Interviews	£11,979	2.0%	-17.8%
Other Face to face interview	£195,168	32.9%	16.5%
Telephone Interview	£115,369	19.5%	0.6%
Mystery Shopping	£10,020	1.7%	0.9%
Other Observation	£1,733	0.3%	31.4%
Postal/Self completion	£47,665	8.0%	8.4%
Web/Internet Interview	£1,164	0.2%	1978.9%
Other Method	£14,571	2.5%	-7.2%

RESPONDENTS BY METHOD

	1999 Volume 000s	% of 1999 total	Yr/Yr % change 1998 v 1999
Consumer Panel	97,548	0.6%	90.5%
Discussion Group	119,637	0.8%	-4.3%
Depth Interviews	35,463	0.2%	-4.1%
Hall/Central Location: Total	593,996	3.7%	-36.7%
Std Hall	573,274	3.6%	-1.6%
Capi/Cati Hall	20,722	0.1%	-35.1%
Street Interviews	931,240	5.9%	-3.4%
Other Face to Face: Total	4,526,472	28.5%	-4.6%
Std Other Face to Face	3,808,063	24.0%	7.2%
Capi/Cati Other Face to Face	718,409	4.5%	-11.8%
Telephone Interviews: Total	3,831,241	24.1%	-7.7%
Std Telephone	2,260,191	14.2%	-20.4%
Capi/Cati Telephone	1,571,050	9.9%	12.7%
Mystery Shopping	246,500	1.6%	-68.7%
Other Observation	26,249	0.2%	-94.8%
Postal/Self completion	5,297,679	33.3%	13.5%
Web/Internet Interview	172,681	1.1%	1035.2%
Other Method	7,855	0.0%	119.7%

** these data are based only on those companies who reported this information for both years. Hence the total is less than the total turnover reported elsewhere