

# PRESS RELEASE

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ESOMAR reports on the eve of celebrating its 60<sup>th</sup> Anniversary

## GLOBAL MARKET RESEARCH INDUSTRY PERFORMS ABOVE EXPECTATIONS

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- Global market research turnover for 2006 is over US\$24.6 billion with 6.8% growth
- Stable growth in Europe of 5.0% - Germany expands at more than double the pace of France and the UK
- Healthy acceleration in North America with growth of 6.6%
- Strong growth in rapidly developing markets in Latin America, Asia Pacific, Eastern Europe and the Middle East
- Latin America is the fastest growing region in 2006 with a sharp increase of 17.1%

### Industry Report

Global market research turnover exceeds US\$ 24.6 billion in 2006 with a growth rate of 6.8% on the year before and net growth of 4.0% after inflation. The industry's performance surpasses expectations and underlines the health of the sector, which has shown continuous growth since ESOMAR began compiling the annual industry study in 1988.

Europe is the leading region with 43% market share, followed by North America (36%), Asia Pacific (14%), Latin America (5%) and the Middle East & Africa (2%).

Growth remains stable in Europe at 5.0% and notably, Germany expands at more than double the pace of France and the UK. North America witnesses healthy acceleration with growth of 6.6%, despite much reported downward pressure on prices due to ongoing adoption of online research.

### Market Research Turnover

Region	Turnover (US\$m)		Absolute growth (%)	Net growth after inflation (%)
	2005	2006	2005/06	2005/06
Europe	10,475	10,597	5.0	2.8
North America	8,306	8,884	6.6	3.4
Asia Pacific	3,330	3,530	8.7	6.6
Latin America	971	1,221	17.1	11.3
Middle East & Africa	343	385	14.4	9.5
<b>World</b>	<b>23,425</b>	<b>24,618</b>	<b>6.8</b>	<b>4.0</b>

ESOMAR estimates.

Rounded figures presented. Growth rates calculated in local currencies. Exchange rate fluctuations eliminated.

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“Our latest Global Market Research report provides clear indication that the market research sector has an increasingly important role in everyday practical and strategic business activities,” confirmed Véronique Jeannin, ESOMAR’s Director General. “Market researchers are expanding their remit to meet the growing and varying needs of their clientele who require more comprehensive research and advisory services worldwide, whilst still being able to provide that necessary crucial local market insight.”

### **Fastest growing markets**

In line with expectations, there is a shift in emphasis to emerging markets, which are increasingly becoming the industry’s growth engines. There is strong growth in Asia Pacific, Eastern Europe, and the Middle East. The fastest growing region in 2006 is Latin America, with a sharp increase of 17.1%; punching well above US\$ 1 billion total turnover in the process.

Brazil, China, India and Russia all record double-digit net growth along with 19 other emerging markets around the world.

### **Online research**

Online research spending is estimated to be above US\$ 3bn in 2006, an increase of around 14% on the year before. Speed and low costs remain the key drivers of adoption – and rising levels of online data collection are helping boutique agencies and consultancies to compete with the larger players.

### **About the Global Market Research Report**

The Global Market Research Report study is conducted every year by ESOMAR in order to assess the main industry trends worldwide. The latest edition is the second report to be developed in cooperation with KPMG Business Advisory Services. Global Market Research 2007 includes:

- Global and regional highlights
- Insight from the industry’s leaders
- Analysis of the industry’s outlook and competitive environment
- A summary of findings of a study on the growth of international research
- A focus on two specific sectors – retail and pharmaceutical – looking at developments that are shaping the market research industry in these areas
- An overview of technological developments and their impact on the research
- The clients’ perspective to provide insight on what matters to them as they decide how and where to spend their research budgets
- A look at the Top 25 firms, market consolidation, and key financial figures of the top 10 companies
- An Industry Journal capturing the main events of the last 18 months

The full report will be released at the 60<sup>th</sup> Anniversary ESOMAR Congress in Berlin, 16-19 September 2007.

## About ESOMAR

ESOMAR is the world organisation for enabling better research into markets, consumers and societies. With over 4500 members in 100 countries, ESOMAR's aim is to promote the value of market and opinion research in illuminating real issues and bringing about effective decision-making.

ESOMAR, which has long been the industry-leading organisation committed to the advancement of market research, celebrates its 60th anniversary this year. This special year reaches a climax with its annual Congress – the world's largest annual meeting for research, marketing, and advertising professionals – in Berlin, from 16 to 19 September 2007.

For more information on ESOMAR and the Annual Congress 2007, please visit [www.esomar.org](http://www.esomar.org).

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