THE RESEARCH**LIVE** INDUSTRY REPORT 2024

INCLUDING THE NEW MRS LEAGUE TABLES

VERVE

MRS Evidence Matters™
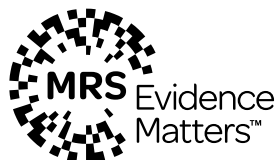
VERVE | BASIS

CoLab is a movement for sustainable research and high-quality data. Underpinned by a participant-first ethos, we're addressing the challenges of respondent quality - at the source.

CoLab.

A collaboration between leading brands, innovative agencies, and thoughtful consumers

www.theinsightcolab.com

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INTRODUCTION

Jane Frost CBE, chief executive, MRS

Welcome to the Research Live Industry Report 2024

This report brings together multiple sources of intelligence. The MRS League Tables are built on 2022 financial data submitted and collected in 2023; the data is focused solely on UK-based turnover and international work managed and invoiced from the UK. Thank you to our sponsor Verve for supporting the Industry Report for the second consecutive year.

The report looks in two directions at once; looking backwards at the year gone in terms of financial performance, and forwards in the form of interviews with clients and agencies coupled with business sentiment data. The report provides an important health check on the state of the research sector.

2022 was widely a year of growth, and overall year-on-year growth within the Top 100 agencies was just under 10% (page 13). According to the latest MRS Business Sentiment Monitor (page 40), 50% of companies anticipate a revenue increase next year, while 12% predict a revenue decline. No change was expected by 38%.

Our interviews with agencies and clients (page 30) as well as the article from a recruiter (page 37) all agree that next year will see further tightening of budgets alongside a constricted UK economy.

And yet...

There's something in the air which gives us a lot of hope. The MRS Awards last December was our largest ever awards – nearly 1000 attendees filled the Grand Hall at Old Billingsgate Market in London. There was no lack of joy, talent and inspiration on display that evening.

In this 'post ChatGPT world', AI has gifted our industry with a huge opportunity. Yes, there are ethical and regulatory concerns which our draft AI guidance is addressing (page 36). But generative AI can also provide huge support to our projects and budgets, and free researchers up to do the human stuff – critical thinking, analysis and story telling – that makes them so valuable for businesses increasingly overloaded with data. Generative AI could also prove invaluable in tackling the existential risk that data fraud poses to our sector (page 6).

It is particularly heartening to see the gender pay gap among our respondents at +13.3% – that's better than the national average of +14.3% (page 24). We've also seen plenty of research businesses signing up for our inclusion and net zero pledges (page 4).

So while there is a sense of caution in the business community, there is much to be excited about for the research sector in 2024. Not least MRS Annual Conference 2024 on 12 March whose theme is 'Applied transformation: Thriving in the new now' (page 23). Insight professionals continue to be valued by the entire business, as brands and institutions discover that the need to listen and respond to customers and citizens is even more urgent than ever.

I wish you, and your friends, families and colleagues well in 2024.

Jane Frost, CBE, chief executive, MRS

Pledge to make a difference in 2024

A manifesto for opportunity
The research sector is taking steps to ensure that it is representative of the world around us.

- ✓ **Publishing annual pay statistics**
- ✓ **Diversity at board level**

Sign up to the MRS Inclusion Pledge.

Manifesto for Opportunity

MRS Inclusion Pledge

The Inclusion pledge has been signed by:

- 2CV Research
- 72 Point (OnePoll)
- 7th Sense Research UK Ltd
- Acumen Field Ltd
- Alligator Research
- Ardent Fieldwork Ltd
- AudienceNet Ltd
- Aspect Viewing
- Axiomtranslate
- Basis Research Ltd
- Beam Fieldwork
- Behaviorally UK, Ltd
- Bilendi & Respondi
- Blue Yonder Research Ltd
- BMG Research Ltd
- Boxclever
- buzzback
- BVA BDRC
- C Space
- Cint UK Ltd
- ClearView Research
- Cobalt Sky
- Cognisant Research
- Context Consulting
- Critical Research
- Delineate
- Differentology Ltd
- Discovery Research Ltd
- DJS Research Ltd
- Echo Research Ltd
- Edelman Data & Intelligence (DxI)
- Empower Translate (Global) Ltd

- England Marketing
- FieldworkHub Ltd
- Firefish Ltd
- FlexMR
- Frequency
- Full Colour Research
- Fuller Research Group
- GfK UK Ltd
- Glow UK Hub Ltd
- Hall & Partners Europe Ltd
- Hannelius Recruitment
- Harris Interactive UK Limited
- Human8
- IFF Research Ltd
- Ipsos UK
- i-view London Ltd
- Kadence International
- Kantar
- Kantar public
- Kudos Research
- Kynetec
- Launchpad Research Ltd
- LDA Research Ltd
- Measure Protocol Ltd
- MESH Experience
- Mintel Group Ltd
- MIS Group Intl. Ltd
- MM-Eye
- Morris Hargreaves McIntyre
- mTab

- MTM
- Mustard Research
- Ninth Seat
- Norstat UK Ltd
- Northstar UK
- Obsurvant
- Opinium
- PFA Research Ltd
- Potentia Insight Ltd
- PPL Insights
- PricewaterhouseCoopers
- PRS In Vivo
- QRi Consulting
- Quadrangle
- RED C Research UK Ltd
- Research Opinions Ltd
- RONIN International Ltd
- Sanctuary Graduates
- Savanta Group Ltd
- Shift Insight
- Simpson Carpenter Ltd
- Solutions Strategy Research Facilitation Ltd
- STRAT7 Crowd DNA
- STRAT7 Jigsaw
- STRIVE Insight Ltd
- The Future Laboratory
- The Good Side
- The Nursery Research & Planning
- The Survey Initiative
- The Unmistakables
- The Young Foundation

- Thinks Insight & Strategy
- Toluna
- Truth
- Verian
- Verve
- Walnut Unlimited
- WALR Group
- Watermelon Research (London)
- Wavehill
- Yonder Consulting Ltd
- YouGov Plc
- ZappiStore

Independent consultants
- ACE Market research
- Bayes Price
- Caledonia Market Research
- Catalyst Research
- Collaborate Research
- Constellation-I Ltd
- Danny Russell Consulting
- Field Solutions Market Research
- IndustryLine Research Ltd
- insight engineers ltd
- Moorcroft MR
- Oxygen Brand Consulting
- Qualitative Street Ltd
- Sharp Research Ltd
- True Insights
- Untapped innovation
- Vanatge Point

Find out why leaders have signed their organisations up to the Pledge mrs.org.uk/inclusionpledge

MRS™

HIGHLIGHTS FROM THIS REPORT*

9bn

THE VALUE OF THE UK RESEARCH, INSIGHT AND ANALYTICS INDUSTRY

£4.8bn

TURNOVER OF TOP 100 INDIVIDUAL AGENCIES. VERSUS £4.5BN GENERATED IN 2021
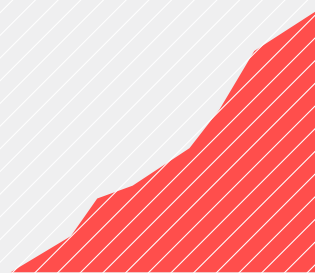
9.9%

GROWTH YEAR-ON-YEAR FOR TOP 100 INDIVIDUAL AGENCIES. UP FROM 6.4% IN 2021

13.3%

GENDER PAY GAP IN UK RESEARCH COMPANIES, VERSUS THE NATIONAL AVERAGE OF +14.3%

+3%

THE AVERAGE REVENUE GROWTH ANTICIPATED BY RESEARCH BUSINESS OWNERS IN 2024

50%

OF EUROPEAN RESEARCH OUTPUT IN 2022 WAS GENERATED IN THE UK

*All figures on this page are referenced in this report except '9bn' which is from MRS Industry Size and Growth Rates.

RESPONDENT QUALITY & AI

Andrew Cooper, CEO & Founder, Verve

Two distinct, but interrelated, topics dominated industry conversation last year: respondent authenticity and the rise of AI.

For some, these are worrying trends that signal the end of days for research. I prefer to take a more optimistic view, seeing in both an exciting evolution and a necessary overhaul of the way things have been done. Either way, these are very real shifts that can't be ignored and that will fundamentally impact how our industry changes, and *needs* to change, in 2024.

VERVE

IT'S CRUNCH TIME FOR RESPONDENT AUTHENTICITY

We are facing a growing, and inescapable respondent authenticity problem. The online access panel model has brought many advantages (it's cheap! It's quick!) and has dominated quantitative research for two decades now. However, there's an increasing body of evidence that cheap-as-chips marketplace sampling has reached its peak. The less well-regulated versions of the marketplace sampling 'cash for surveys' model is providing opportunities to game the system and, in the worst cases, delivering fraudulent or unverifiable data.

As an industry, we are guilty of enabling this problem to grow, not least through poor research design that is not respectful of participants' time. 15 years ago, when I founded Verve to pioneer the community panel model, concerns for 'respondent quality' were borne out of clients complaining about drop-out rates for their dull 45-minute grid surveys. I mean, who can stick it out that long and, if they do, are they really paying attention until the end?

I was perhaps early with my strong view on the unsustainability of the access panel model at the time; there were then many more respondents to 'burn through' it seems. However, even I have been surprised by the massive acceleration of the problem in recent times; industrialised through the growing presence of synthetic respondents or AI chat bots in the pay-per-survey approach. This is a trend that is only going to be accelerated as 'bad actors' continue to game the established models for incentives.

Of course, many agencies and access panels are working hard to address these challenges, but extracting poor quality sample from data is a temporary fix, not a sustainable solution. Removing up to 30-40% of responses in any given survey ultimately leads to justified questions around the validity of what's left.

The answer as we see it is to tackle the problem at the source. Verve is partnering with Basis to offer an innovative solution to the challenge. Rather than weeding out bad actors after the event, CoLab borrows from the community panel model to create a better approach to sustainable insight, through the use of engaged respondents (sourced from authentic client lists) and brilliant brands who want to do things differently.

EXTRACTING POOR QUALITY SAMPLE FROM DATA IS A TEMPORARY FIX, NOT A SUSTAINABLE SOLUTION.

THE UBIQUITOUS QUESTION OF AI
Onto the second topic.

AI can and should be part of the solution to the respondent authenticity challenge. However, it's not about using AI to police the bots. Instead, we should be using it to ease the pressures on the base of genuine research participants, leveraging its power so we don't, by default, always need to turn to real people to ask more and more questions.

Over the past 12 months, AI has already demonstrated that it can create huge efficiencies in how we work in everything from data collection through to analysis. It can improve research experiences, enabling, for example, more conversational, interactive, and engaging surveys.

More impressively, it enables us to do things that were not possible before by humans alone. We've seen great success with semiotics at scale – leveraging rich data that already exists in the world (such as on social media) and which doesn't require new primary research to access.

Where AI is perhaps now getting most exciting is in what we've been calling 'Intelligent Personas'. If 'synthetic data' in the pejorative sense is generated by pointing AI at unknown data sources and purporting them to be responses from real people, then the positive flip side is Intelligent Personas.

Ultimately, one of the best ways of dealing with people not being who they say they are or getting bored by tedious surveys, is not to have to ask them to take part in the first place! Rather, a well-trained model built from a large and high-quality customer representative dataset offers an alternative solution.

Think of it as a new kind of market simulation: customised AI models trained from high quality and regularly updated client datasets, and used knowingly as an alternative to asking human respondents. Done well, these models can diligently represent the view of clients' customer segments, be they consumer or B2B brands.

In doing so, they can bring audiences to life for stakeholders and respond to stimuli with an uncanny degree of accuracy, enabling virtual concept testing, amongst other things.

And of course, they never get tired, they never get bored… and they never stop. A sustainable way to get rapid answers to the more repetitive or onerous research projects, or to streamline primary research projects. Plus, a chance to democratise research to those companies whose smaller insight budgets don't allow the luxury of large-scale primary research.

These AI generated models also co-exist symbiotically with research from real people. Take community panels, for example which are always a 'safe space' to do research with authentic respondents, given their recruitment via client-owned CRM databases. Community panels also provide an ongoing high-quality respondent dataset from which to build, validate and update Intelligent Personas to ensure they move with the times and respond consistently with humans.

BEFORE ROLLING OUT YET ANOTHER OVERLY LONG, GRID-FILLED SURVEY, WE SHOULD THINK ABOUT WHETHER WE ARE TREATING THE REAL PEOPLE WITH THE RESPECT THEY DESERVE.

A NEW DAWN FOR RESEARCH

Whether building AI market simulations or finding better ways to capture data, a human overlay remains critical. The agencies who differentiate will be those who deploy these platforms and approaches more smartly to augment their expertise, commercial interpretation, and real-world application of data to client problems.

Most importantly, the growing respondent crisis and the allure of AI alternatives to primary research doesn't mean we should stop asking real people questions. Quite the opposite.

But before rolling out yet another overly long, grid-filled survey, we should think about whether we are treating the real people with the respect they deserve, both in how and what we're asking them do. We can use AI simulations or other existing data as needed but save the really important research – the research of consequence – for real people.

MRS LEAGUE TABLES
ANALYSIS

David Barr, league tables compiler

In 2022, the Top 100 individual agencies generated total turnover of £4.768bn. Overall year-on-year growth within these 100 agencies was 9.871%.

2022 can reasonably be described as a year which illustrated the resilience of the industry. Only 17 of the Top 100 reported a decline in turnover, and the impressive overall growth rate kept pace with or exceeded the high rate of inflation. This was achieved despite price constraints in a very competitive industry. The developed world experienced the effects of geopolitical turbulence, volatile operating costs, severe inflationary pressures, and recession in some important markets.

TOTAL TURNOVER AND GROWTH RATES OF TOP 100 INDIVIDUAL AGENCIES

	2015	2016	2017	2018	2019	2020	2021	2022
TOTAL TURNOVER	£2.942bn	£3.026bn	£3.295bn	£3.627bn	£3.756bn	£4.076bn	£4.452bn	£4.768bn
GROWTH RATE	6.7%	2.8%	6.5%	3.9%	4.8%	0.8%	6.4%	9.9%

NUMBER OF TOP 100 INDIVIDUAL AGENCIES WITH GROWING/DECLINING TURNOVER

	2015	2016	2017	2018	2019	2020	2021	2022
GROWING TURNOVER	72	67	64	57	66	46	75	83
DECLINING TURNOVER	28	33	36	43	34	54	25	17

The composition of the table of the Top 100 Individual Agencies Ranked by UK-based Turnover changes every year, with variable amounts of change on each occasion. Some agencies cease to qualify as their turnover declines below the variable eligibility threshold. They are replaced by others whose growth has enabled them to qualify for the first time. Mergers, acquisitions, and divestments, private equity investments, and brand consolidations all have a major impact on the composition of the table and the rankings within it.

The table can only be as comprehensive as available and reliable data allows. Some important and eligible activities within public companies are not separately declared in the public domain, so total turnover is inevitably understated to some extent.

In the trend data, Total Turnover relates to all the agencies featured in the table in each particular year. Likewise, the Growth Rate relates to overall year-on-year growth of all the agencies featured in each particular year. The change in composition of the table each year means that it does NOT represent growth over the previous year's table. Nor should it be interpreted as a general growth rate for the whole industry.

INTERNATIONAL CONTEXT
1. ULTIMATE OWNERSHIP
The MRS Table of the Top 50 Consolidated Businesses focuses on concentration of ownership of multiple agencies where it occurs. Ownership of these UK-based businesses (including ultimate holding companies and majority private equity) is as follows: UK: 28; USA: 17; France: 2; Others: 3 (one each from Germany, Belgium, Netherlands).

2. UNITED STATES
The world's largest industry is in the USA. Second largest is the UK, disproportionately so when placed in the context of the size of the US economy. The USA is a major investor in the UK-based industry, both within the industry and increasingly via private equity. In any mature industry there is an expectation of a high level of consolidation at the top accompanied by a long tail of much smaller businesses. Clearly the UK has a greater number of substantial medium-sized businesses than the USA, and also a much more internationally-focused industry. Many of the leading groups in the USA which are US-owned and headquartered serve predominantly the large domestic US market and have relatively low levels of non-US turnover. Not only are they minimal exporters, many have virtually no international or global capability. The UK retains its long-term status as a hub for management of international projects.

3. EUROPE
The UK is by far the largest supplier in Europe of market research, analytics, and insight, representing in 2022 over 50% of total declared European output.

ELIGIBILITY AND COMPILATION METHODOLOGY
ELIGIBILITY
Eligible organisations ranked in the MRS League Tables provide monitoring, measurement, and understanding of markets and societies in support of well-informed and evidence-based decision-making. They deploy a wide and eclectic range of personnel, techniques, technologies, methodologies, skills, experience, knowledge, and expertise. Likewise, they deliver their services via many different business models, media, and distribution channels.

The tables seek to identify and rank the industry's largest businesses according to their UK-based turnover (including international work controlled and/or invoiced from the UK), and by their year-on-year growth (or contraction) of turnover. Growth can be organic or by acquisition, or a combination of both. Although the tables do not differentiate these, the Notes may do so. The tables also contribute to the calculation of the MRS estimates of overall industry size and growth rate.

In addition to the 100 agencies in the table with turnover exceeding the threshold, the industry also has thousands of smaller suppliers, ranging from generalists to boutique specialists, who provide high-quality work and excellent customer service. Also, the tables rank turnover but do not record or rank profitability. Nonetheless, achievement of scale is a valid statement of business success, and many agencies vie each year for the recognition arising from featuring in the Table of Top 100 Individual Agencies.

TABLE OF TOP 100 INDIVIDUAL AGENCIES

This table ranks the top 100 individual agencies by UK-based turnover. These agencies are identifiable as separate UK-based companies regardless of whether their ownership is independent or part of a larger group, and also regardless of location of ultimate ownership. Among these agencies, growth is neither universal nor evenly distributed, as is highlighted in the table ranking the 20 fastest-growing agencies.

TABLE OF TOP 50 CONSOLIDATED BUSINESSES

This table draws agencies (where appropriate) together under ownership groups. It further highlights the extent of industry consolidation and the concentration of turnover in the largest groups. In relevant cases the Notes accompanying the Table identify ultimate ownership as well as named subsidiary agencies which are included in the calculation of group turnover. However, the table ranking the 20 fastest-growing businesses shows no correlation between scale of turnover and rate of growth.

SOURCES

The tables are compiled in early November using the latest data available. Many information sources are used in the compilation process. The business and trade press, related websites, and other media yield a great deal of information. Annual reports of public companies range from the informative and transparent to the minimalist and oblique (hence the issue of under-declaration). Statutory filings at Companies House are the principal source of comparative data in the public domain but financial years and reporting dates vary. Most are December but a few are as early as February and March.

Small private companies which file abbreviated accounts at Companies House send their turnover data on request directly to the compiler. For some companies, turnover is estimated. Estimates are in italics and tend to be cautious.

Within the tables, previous-year turnover is amended for some entries to replace the compiler's estimates with actual turnover subsequently reported; to include prior-year restatements by auditors; and to ensure like-for-like comparative data with the current year. However, following such amendments the previous year's entries are not re-ranked and the tables are not re-published. Consequently, the movement in ranking for some entries in the current year may be affected. In this context, it is also worth stating that each year there are new entries into, and departures from, the tables, so the top 100 agencies are not entirely the same agencies as in previous years. This may also distort movements in rankings.

Suggestions of eligible agencies for future inclusion are welcome. Please send an email to the league tables compiler, David Barr, via industry.statistics@mrs.org.uk

MRS LEAGUE TABLES
TOP 100 INDIVIDUAL AGENCIES RANKED BY TURNOVER

2022 MRS LEAGUE TABLES, COMPILED NOVEMBER 2023

2022 RANKING NUMBER	CHANGE ON PREVIOUS RANKING	2021 RANKING NUMBER	COMPANY NAME	2022 (£M.)	2021 (£M.)	2020 (£M.)	% CHANGE ON PREVIOUS YEAR	GROWTH RANKING	MRS PLEDGES	
									NET ZERO	INCLUSION
1	=	1	Kantar	*396.246*	469.510	432.129	-15.604%	96		●
2	=	2	Ipsos	367.498	329.595	341.045	11.500%	48	●	●
3	=	3	Gartner	364.824	288.679	283.950	26.377%	21		
4	=	4	Wood Mackenzie	261.858	231.067	232.141	13.326%	46		
5	=	5	Dunnhumby	*253.852*	*216.913*	*249.643*	17.029%	38		
6	▲	7	Euromonitor	160.440	148.120	151.129	8.318%	57		
7	▲	8	Mintel	149.283	138.214	131.886	8.009%	60		
8	▼	6	GlobalData	135.636	88.478	72.672	53.299%	4		
9	=	9	CACI	132.638	119.531	119.933	10.965%	51		
10	=	10	Verint Systems	112.556	114.155	116.335	-1.401%	86		
11	▲	15	FastMarkets	106.810	85.400	83.700	25.070%	23		
12	▲	16	IQVIA	*97.321*	*83.537*	74.525	16.500%	41		
13	▼	12	Information Resources	96.583	92.963	59.918	3.894%	69		
14	=	14	Forrester Research	95.640	88.213	79.075	8.419%	55		
15	▼	11	NielsenIQ	*92.500*	84.652	100.206	9.271%	53		
16	▼	13	GfK	92.258	92.822	77.106	-0.608%	85	●	●
17	=	17	Nice Systems	81.884	83.511	69.699	-1.948%	89		
18	▲	19	Ebiquity	75.973	63.091	55.907	20.418%	29		
19	▲	20	Teradata	71.800	59.623	48.346	20.423%	28		
20	▼	18	Dynata Global	68.212	67.535	64.518	1.002%	80		
21	▲	22	Evaluate	*62.500*	53.490	41.792	16.844%	40		
22	▲	23	YouGov	57.900	52.100	47.200	11.132%	50	●	●
23	▼	21	IDC	*55.500*	53.560	50.940	3.622%	72		
24	▲	25	NatCen	49.241	41.414	32.755	18.899%	33		
25	▲	26	CRU International	46.923	40.946	36.091	14.597%	45		

Those in *italics* are estimated or partially estimated figures

Those marked '--' are new entrants

2022 MRS LEAGUE TABLES, COMPILED NOVEMBER 2023

2022 RANKING NUMBER	CHANGE ON PREVIOUS RANKING	2021 RANKING NUMBER	COMPANY NAME	2022 (£M.)	2021 (£M.)	2020 (£M.)	% CHANGE ON PREVIOUS YEAR	GROWTH RANKING	MRS PLEDGES NET ZERO	INCLUSION
26	--	--	Kantar Public	45.600	69.600	43.200	-34.483%	99		●
27	=	27	WGSN	*45.500*	40.709	39.392	11.769%	47		
28	▲	29	OMDIA	43.437	33.957	34.711	27.918%	19		
29	▼	28	Medallia	*42.550*	39.688	29.876	7.211%	62		
30	▲	31	Quantexa	37.177	30.307	17.545	22.668%	24		
31	▲	32	Savanta	36.044	29.938	25.681	20.395%	30	●	●
32	▲	40	Sprinklr	30.456	23.806	21.471	27.934%	18		
33	▲	37	Kynetec	30.170	26.242	15.992	14.968%	43		●
34	▲	35	WorldOne Research	*29.500*	26.497	21.309	11.333%	49		
35	▲	49	MMR Research Worldwide	29.484	16.798	20.589	75.521%	2	●	
36	▼	34	Cello Health Insight	*29.250*	28.394	25.558	3.015%	73		
37	▲	38	Yonder Consulting	28.063	18.459	25.983	52.029%	5	●	●
38	▲	57	Economist Intelligence / EIU	28.052	15.016	14.758	86.814%	1		
39	▼	36	Edge By Ascential	*27.250*	26.458	25.864	2.993%	74		
40	▲	41	The Gallup Organisation	26.218	23.722	19.395	10.522%	52		
41	▲	51	Cint	*25.550*	22.269	14.824	14.733%	44		●
42	▼	39	Hall & Partners	*24.500*	23.044	21.562	6.318%	64		●
43	▼	33	Toluna	24.444	27.955	24.310	-12.559%	95		●
44	▼	43	Frost & Sullivan	*20.950*	20.854	20.465	0.460%	83		
45	▲	55	Insites Consulting	20.420	15.053	16.320	35.654%	13		●
46	▲	62	GWI GlobalWebIndex	19.226	12.292	9.270	56.411%	3		
47	▲	56	2CV	*18.912*	17.498	14.691	8.081%	59		●
48	▼	46	IHS Markit Economics	*18.550*	18.450	18.237	0.542%	82		
49	▲	54	Defaqto	18.285	15.331	14.557	19.268%	32		
50	▼	44	Forsta Worldwide	*17.255*	16.919	16.784	1.986%	76		

Those in *italics* are estimated or partially estimated figures

Those marked '--' are new entrants

2022 MRS LEAGUE TABLES, COMPILED NOVEMBER 2023

2022 RANKING NUMBER	CHANGE ON PREVIOUS RANKING	2021 RANKING NUMBER	COMPANY NAME	2022 (£M.)	2021 (£M.)	2020 (£M.)	% CHANGE ON PREVIOUS YEAR	GROWTH RANKING	MRS PLEDGES NET ZERO	INCLUSION
51	▲	70	Walnut Unlimited	16.429	11.512	14.851	42.712%	8	●	●
52	=	52	InMoment	16.250	15.443	16.113	5.226%	66		
53	=	53	C Space	16.050	15.287	13.942	4.991%	68		●
54	--	--	Healthcare Research Worldwide	15.653	11.024	9.900	41.990%	10		
55	▼	47	Concentra Analytics	15.581	17.362	16.007	-10.258%	94		
56	▼	24	The Research Partnership	15.286	18.135	17.436	-15.710%	97		
57	▲	66	Firefish	15.177	11.679	12.873	29.951%	15	●	●
58	--	--	AIIMI	14.943	11.922	8.064	25.340%	22		
59	▲	75	Information Services Group	14.928	10.310	12.269	44.791%	7		
60	▲	61	IFF Research	14.864	12.624	13.953	17.744%	35	●	●
61	▲	65	B2B International	14.307	11.717	9.395	22.105%	26	●	
62	▲	63	STRAT7 Incite	14.205	12.120	12.439	17.203%	36		
63	▲	77	MetrixLab	13.944	10.140	9.023	37.515%	11		
64	▼	30	Prescient Healthcare	13.759	10.572	10.378	30.146%	14		
65	▼	59	Harris Interactive	13.187	13.453	10.943	-1.977%	90		●
66	▼	60	Advertising Intelligence	12.859	12.646	13.381	1.684%	78		
67	▲	72	PA Consulting	12.601	10.678	8.440	18.009%	34		
68	▼	58	The Planning Shop International	12.500	12.059	13.386	3.657%	71		
69	▼	67	Nielsen Book Services	12.400	12.127	11.855	2.251%	75		
70	▲	80	BVA-BDRC	11.759	9.594	8.068	22.566%	25	●	●
71	▲	84	Opinium Research	11.625	9.001	6.934	29.152%	17	●	●
72	▼	64	PwC Research	11.555	11.755	12.255	-1.701%	87		
73	--	--	Basis Research	11.485	9.824	9.429	16.908%	39		●
74	=	74	Nielsen Media Research	11.250	10.590	9.177	6.232%	65		
75	▼	68	Zappistore	10.950	10.866	11.224	0.773%	81	●	●

Those in *italics* are estimated or partially estimated figures

Those marked '--' are new entrants

2022 MRS LEAGUE TABLES, COMPILED NOVEMBER 2023

2022 RANKING NUMBER	CHANGE ON PREVIOUS RANKING	2021 RANKING NUMBER	COMPANY NAME	2022 (£M.)	2021 (£M.)	2020 (£M.)	% CHANGE ON PREVIOUS YEAR	GROWTH RANKING	MRS PLEDGES NET ZERO	INCLUSION
76	▲	85	Shoppertrak	10.555	10.166	9.639	3.826%	70		
77	▲	79	NPD Group	10.507	9.648	8.820	8.903%	54		
78	▼	71	Adelphi International Research	10.500	10.326	10.329	1.685%	77		
79	▼	73	Behavioural Insights	10.419	10.602	10.094	-1.726%	88		
80	▼	48	BMG Research	10.247	16.985	7.161	-39.670%	100	●	
81	▲	89	MTM	10.180	7.872	6.083	29.319%	16	●	●
82	▼	81	Verve	9.950	9.470	7.230	5.069%	67	●	●
83	--	--	STRAT7 Researchbods	9.640	8.045	6.585	19.826%	31		
84	--	--	STRAT7 CrowdDNA	9.552	6.348	4.821	50.473%	6		●
85	▼	78	Simpson Carpenter	9.524	10.025	6.868	-4.998%	92		
86	▼	69	Streetbees	9.292	11.576	7.073	-19.730%	98		
87	▼	86	Nielsen Sports	9.086	8.479	7.557	7.159%	63		
88	▲	91	RONIN International	9.077	7.440	4.775	22.003%	27		●
89	▲	94	System 1 Research	8.576	6.707	5.570	27.866%	20		
90	=	90	STRAT7 Jigsaw	8.555	6.001	6.502	42.560%	9		●
91	▼	83	Flamingo Research	8.225	8.574	9.865	-4.070%	91		
92	▼	88	Springboard Research	7.950	7.819	7.388	1.675%	79		
93	--	--	MARU Matchbox	7.850	7.255	6.391	8.201%	58		
94	▼	92	DJS Research	7.631	7.100	6.291	7.479%	61	●	●
95	--	--	KPMG Nunwood Consulting	7.601	5.548	8.478	37.004%	12		
96	▲	100	Nielsen Netratings	7.550	7.576	6.075	-0.343%	84		
97	=	97	Promar International	7.404	6.320	6.092	17.152%	37		
98	▼	95	Truth Consulting	7.250	6.690	4.638	8.371%	56		
99	▼	87	Trinity McQueen	7.239	7.849	6.985	-7.772%	93		
100	▼	98	Kokoro	7.214	6.235	7.567	15.702%	42		
TOTAL				**4767.840**	**4339.471**	**4075.597**				

Those in *italics* are estimated or partially estimated figures

Those marked '--' are new entrants

MRS LEAGUE TABLES
TOP 20 FASTEST-GROWING INDIVIDUAL AGENCIES

2022 MRS LEAGUE TABLES, COMPILED NOVEMBER 2023

2022 RANKING	GROWTH RATE	COMPANY NAME	2022 (£M.)	2021 (£M.)	MRS PLEDGES NET ZERO	INCLUSION
1	86.814%	Economist Intelligence/EIU	28.052	15.016		
2	75.521%	MMR Research Worldwide	29.484	16.798	●	
3	56.411%	GWI GlobalWebIndex	19.226	12.292		
4	53.299%	GlobalData	135.636	88.478		
5	52.029%	Yonder Consulting	28.063	18.459	●	●
6	50.473%	STRAT7 Crowd DNA	9.552	6.348		●
7	44.791%	Information Services Group	14.928	10.310		
8	42.712%	Walnut Unlimited	16.429	11.512	●	●
9	42.560%	STRAT7 Jigsaw	8.555	6.001		●
10	41.990%	Healthcare Research Worldwide	15.653	11.024		
11	37.515%	MetrixLab	13.944	10.140		
12	37.004%	KPMG Nunwood Consulting	7.601	5.548		
13	35.654%	Insites Consulting	20.420	15.053		●
14	30.146%	Prescient Healthcare	13.759	10.572		
15	29.951%	Firefish	15.177	11.679	●	●
16	29.319%	MTM	10.180	7.872	●	●
17	29.152%	Opinium Research	11.625	9.001	●	●
18	27.934%	Sprinklr	30.456	23.806		
19	27.918%	OMDIA	43.437	33.957		
20	27.866%	System 1 Research	8.576	6.707		

Those in *italics* are estimated or partially estimated figures

MRS LEAGUE TABLES
TOP 50 CONSOLIDATED BUSINESSES RANKED BY TURNOVER

2022 MRS LEAGUE TABLES, COMPILED NOVEMBER 2023

2022 RANKING NUMBER	CHANGE ON PREVIOUS RANKING	2021 RANKING NUMBER	COMPANY NAME	2022 (£M.)	2021 (£M.)	2020 (£M.)	% CHANGE ON PREVIOUS YEAR	GROWTH RANKING	MRS PLEDGES NET ZERO	MRS PLEDGES INCLUSION
1	=	1	Kantar	*396.246*	469.510	432.129	-15.604%	49		●
2	=	2	Ipsos	367.498	329.595	341.045	11.500%	26	●	●
3	=	3	Gartner	364.824	288.679	283.950	26.377%	10		
4	=	4	Wood Mackenzie	261.858	231.067	232.141	13.326%	25		
5	=	5	Dunnhumby	*253.852*	*216.913*	*249.643*	17.029%	18		
6	▲	7	Euromonitor	160.440	148.120	151.129	8.318%	33		
7	▲	8	Mintel	149.283	138.214	131.886	8.009%	35		
8	▼	6	GlobalData	135.636	88.478	72.672	53.299%	5		
9	=	9	CACI	132.638	119.531	119.933	10.965%	29		
10	=	10	Verint Systems	112.556	114.155	116.335	-1.401%	46		
11	▲	15	FastMarkets	106.810	85.400	83.700	25.070%	11		
12	▲	16	IQVIA	*97.321*	*83.537*	74.525	16.500%	20		
13	▼	12	Information Resources	96.583	92.963	59.918	3.894%	38		
14	=	14	Forrester Research	95.640	88.213	79.075	8.419%	32		
15	▼	11	NielsenIQ	*92.500*	84.652	100.206	9.271%	31		
16	▼	13	GfK	92.258	92.822	77.106	-0.608%	45	●	●
17	=	17	Nice Systems	81.884	83.511	69.699	-1.948%	47		
18	▲	21	Ebiquity	75.973	63.091	55.907	20.418%	14		
19	▲	20	Ascential	*72.750*	67.167	65.256	8.312%	34		
20	▲	22	Teradata	71.800	59.623	48.346	20.423%	13		
21	▼	18	Omnicom/DAS	*71.775*	69.290	69.084	3.586%	40		
22	▼	19	Dynata Global	68.212	67.535	64.518	1.002%	42		
23	▲	24	Evaluate	*62.500*	53.490	41.792	16.844%	19		
24	▲	25	YouGov	57.900	52.100	47.200	11.132%	28	●	●
25	▼	23	IDC	*55.500*	53.560	50.940	3.622%	39		

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Those marked '--' are new entrants

2022 MRS LEAGUE TABLES, COMPILED NOVEMBER 2023

2022 RANKING NUMBER	CHANGE ON PREVIOUS RANKING	2021 RANKING NUMBER	COMPANY NAME	2022 (£M.)	2021 (£M.)	2020 (£M.)	% CHANGE ON PREVIOUS YEAR	GROWTH RANKING	MRS PLEDGES NET ZERO	INCLUSION
26	=	26	Nielsen Global Media	*53.145*	51.498	49.696	3.198%	41		
27	▲	49	STRAT7 Group	52.522	18.023	14.326	191.417%	1		
28	▲	30	NatCen	49.241	41.414	32.755	18.899%	17		
29	=	29	Cello Health	*48.162*	45.872	40.249	4.992%	37		
30	▲	32	CRU International	46.923	40.946	36.091	14.597%	23		
31	--	--	Kantar Public	45.600	69.600	43.200	-34.483%	50		●
32	--	--	MMR Group	45.137	27.822	*30.489*	62.235%	3	●	
33	--	--	OMDIA	43.437	33.957	34.711	27.918%	9		
34	▼	33	Medallia	*42.550*	39.688	29.876	7.211%	36		
35	▼	31	Toluna Group	37.631	41.408	35.253	-9.121%	48		●
36	▼	35	Quantexa	37.177	30.307	17.545	22.668%	12		
37	▼	36	Savanta	36.044	29.938	25.681	20.395%	15	●	●
38	▲	41	Sprinklr	30.456	23.806	21.471	27.934%	8		
39	▼	38	Kynetec	30.170	26.242	15.992	14.968%	21		●
40	▼	37	WorldOne Research	*29.500*	26.497	21.309	11.333%	27		
41	▼	39	Yonder Consulting	28.063	18.459	25.983	52.029%	6	●	●
42	--	--	Economist Intelligence / EIU	28.052	15.016	14.758	86.814%	2		
43	=	43	Basis Research Group	27.502	22.958	18.595	19.793%	16		●
44	▼	40	BVA-BDRC Group	27.220	23.883	20.279	13.972%	24	●	●
45	▼	42	The Gallup Organisation	26.218	23.722	19.395	10.522%	30		
46	--	--	Cint	*25.550*	22.269	14.824	14.733%	22		●
47	▼	45	Frost & Sullivan	*20.950*	20.854	20.465	0.460%	44		
48	--	--	InSites Consulting	20.420	15.053	16.320	35.654%	7		●
49	--	--	GWI GlobalWebIndex	19.226	12.292	9.270	56.411%	4		
50	▼	48	IHS Markit Economics	*18.550*	18.450	18.237	0.542%	43		

Those in *italics* are estimated or partially estimated figures

Those marked '--' are new entrants

MRS LEAGUE TABLES
TOP 20 FASTEST-GROWING BUSINESSES

2022 MRS LEAGUE TABLES, COMPILED NOVEMBER 2023

2022 RANKING	GROWTH RATE	COMPANY NAME	2022 (£M.)	2021 (£M.)	MRS PLEDGES NET ZERO	INCLUSION
1	191.417%	STRAT7 Group	52.522	18.023		
2	86.814%	Economist Intelligence / EIU	28.052	15.016		
3	62.235%	MMR Group	45.137	27.822	●	
4	56.411%	GWI GlobalWebIndex	19.226	12.292		
5	53.299%	GlobalData	135.636	88.478		
6	52.029%	Yonder Consulting	28.063	18.459	●	●
7	35.654%	InSites Consulting	20.420	15.053		●
8	27.934%	Sprinklr	30.456	23.806		
9	27.918%	OMDIA	43.437	33.957		
10	26.377%	Gartner	364.824	288.679		
11	25.070%	FastMarkets	106.810	85.400		
12	22.668%	Quantexa	37.177	30.307		
13	20.423%	Teradata	71.800	59.623		
14	20.418%	Ebiquity	75.973	63.091		
15	20.395%	Savanta	36.044	29.938	●	●
16	19.793%	Basis Research Group	27.502	22.958		●
17	18.899%	NatCen	49.241	41.414		
18	17.029%	Dunnhumby	*253.852*	*216.913*		
19	16.844%	Evaluate	*62.500*	53.490		
20	16.500%	IQVIA	*97.321*	*83.537*		

Those in *italics* are estimated or partially estimated figures

NOTES ON MRS LEAGUE TABLES

TOP 100 INDIVIDUAL AGENCIES

Entry 1: The reduction in Kantar's turnover for 2022 includes the impact of the sale of Kantar Public. See also Entry 1 and Entry 31 in Notes on Top 50 Consolidated Businesses.

Entry 2: Following the decision to cease use of the MORI legacy brand name, Ipsos is now reported in both league tables as a single unibrand entity. It should be noted that 2020 turnover was substantially boosted by inclusion of the REACT study to examine Covid infection rates.

Entry 4: Wood Mackenzie – See Entry 4 in Notes on Top 50 Consolidated Businesses.

Entry 5: Dunnhumby – See Entry 5 in Notes on Top 50 Consolidated Businesses.

Entry 8: GlobalData – See Entry 8 in Notes on Top 50 Consolidated Businesses.

Entry 11: FastMarkets – See Entry 11 in Notes on Top 50 Consolidated Businesses.

Entry 13: Information Resources merged with NPD Group in March 2023 to form CIRCANA.

Entry 15: Nielsen IQ – See Entry 15 in Notes on Top 50 Consolidated Businesses.

Entry 16: GfK – See Entry 16 in Notes on Top 50 Consolidated Businesses,

Entry 20: DynataGlobal – See Entry 22 in Notes on Top 50 Consolidated Businesses.

Entry 25: CRU International – See Entry 30 in Notes on Top 50 Consolidated Businesses.

Entry 26: Kantar Public – See Entry 26: Kantar Public - It should be noted that the 2021 turnover was substantially boosted by inclusion of the Covid Infection Study to examine COVID 19 infection rates. See also Entry 31 in Notes on Top 50 Consolidated Businesses.

Entry 27: WGSN is part of Ascential plc. See also Entry 19 in Notes on Top 50 Consolidated Businesses.

Entry 28: OMDIA is part of Informa plc. See also Entry 33 in Notes on Top 50 Consolidated Businesses.

Entry 35: MMR Research Worldwide is part of the market research division of MMR Group. See also Entry 32 in Notes on Top 50 Consolidated Businesses.

Entry 36: Cello Health Insight is part of Cello Health. See also Entry 29 in Notes on Top 50 Consolidated Businesses.

Entry 37: Yonder Consulting – 2022 turnover was re-stated by the company to eliminate intercompany transactions incorrectly included when integrating one of its subsidiaries. See also Entry 41 in Notes on Top 50 Consolidated Businesses.

Entry 38: Economist Intelligence / EIU – see Entry 42 in Notes on Top 50 Consolidated Businesses.

Entry 39: Edge by Ascential is part of Ascential plc. See also Entry 19 in Notes on Top 50 Consolidated Businesses.

Entry 42: Hall & Partners was part of Omnicom/DAS throughout 2022. It was acquired in early 2023 by Escalent (formerly known as Market Strategies International – Morpace). See also Entry 21 in Notes on Top 50 Consolidated Businesses.

Entry 43: Toluna is part of Toluna Group. See also Entry 35 in Notes on Top 50 Consolidated Businesses.

Entry 45: InSites Consulting – See Entry 48 in Notes on Top 50 Consolidated Businesses.

Entry 47: 2CV is part of Cello Health's Digital Technology Advisory Group (DTAG) which was sold in early 2022 to private equity firm Vespa Capital. See also Entry 29 in Notes on Top 50 Consolidated Businesses.

Entry 48: IHS Markit Economics – See Entry 50 in Notes on Top 50 Consolidated Businesses.

Entry 52: InMoment – formerly MatrixCX. InMoment is a Utah-based customer feedback company.

Entry 53: C Space was part of Omnicom/DAS throughout 2022. It was acquired in 2023 by Escalent (formerly known as Market Strategies International – Morpace). See also Entry 21 in Notes on Top 50 Consolidated Businesses.

Entry 54: Healthcare Research Worldwide is part of the market research division of MMR Group. See also Entry 32 in Notes on Top 50 Consolidated Businesses.

Entry 56: The Research Partnership – following sale to Inizio and subsequent restructuring, this revised entry more accurately reflects UK-based turnover than the entries in previous editions. Inizio is part of the portfolio of private equity firm Clayton Dubilier & Rice.

Entry 58: AIIMI's principal activity is the provision of software and consultancy services with particular focus on AI and data.

Entry 61: B2B International is part of Dentsu International.

Entry 62: STRAT7 Incite, formerly Incite Marketing Planning. See also Entry 27 in Notes on Top 50 Consolidated Businesses.

Entry 63: Throughout 2022 MetrixLab was part of Macromill, a global online consumer insights and analysis group headquartered in Tokyo. In mid-2023 MetrixLab was acquired by Toluna Group. See also Entry 35 in Notes on Top 50 Consolidated Businesses.

Entry 64: Prescient Healthcare – this revised entry more accurately represents UK-based turnover than the entries in previous editions of the league table.

Entry 65: Harris Interactive is part of Toluna Group. See also Entry 35 in Notes on Top 50 Consolidated Businesses.

Entry 66: Advertising Intelligence is a subsidiary of Nielsen Media Research within Nielsen Global Media. See also Entry 26 in Notes on Top 50 Consolidated Businesses.

Entry 67: PA Consulting Human Insight – formerly Sparkler.

Entry 68: The Planning Shop International is part of Omnicom/DAS. See also Entry 21 in Notes on Top 50 Consolidated Businesses.

Entry 69: Nielsen Book Services is part of Nielsen Global Media. See also Entry 26 in Notes on Top 50 Consolidated Businesses.

Entry 70: BVA-BDRC is part of BVA-BDRC Group. See also Entry 44 in Notes on Top 50 Consolidated Businesses.

Entry 73: In 2021 Basis Research Group undertook a major restructure. This revised entry more accurately represents the UK-based turnover of Basis Research, which is part of Basis Research Group with overall turnover exceeding £27.5m. See also Entry 43 in the Table of Top 50 Consolidated Businesses.

Entry 74: Nielsen Media Research is part of Nielsen Global Media. See also Entry 26 in Notes on Top 50 Consolidated Businesses.

Entry 77: NPD Group merged with Information Resources in March 2023 to form CIRCANA.

Entry 78: Adelphi International Research is part of Omnicom/DAS. See also Entry 21 in Notes on Top 50 Consolidated Businesses.

Entry 79: Behavioural Insights is a wholly-owned subsidiary of NESTA, the UK-based innovation foundation.

Entry 80: BMG Research – It should be noted that 2021 turnover was substantially boosted by work relating to the Covid Test & Trace Programme.

NOTES ON MRS LEAGUE TABLES

Entry 83: STRAT7 Researchbods is part of the STRAT7 Group. See also Entry 27 in Notes on Top 50 Consolidated Businesses.

Entry 84: STRAT7 CrowdDNA is part of the STRAT7 Group. See also Entry 27 in Notes on Top 50 Consolidated Businesses.

Entry 87: Nielsen Sports is part of Nielsen Global Media. See also Entry 26 in Notes on Top 50 Consolidated Businesses.

Entry 88: Ronin International is part of the Rippleffect Group.

Entry 89: System 1 Research is part of System 1 Group plc.

Entry 90: STRAT7 Jigsaw is part of the STRAT7 Group. See also Entry 27 in Notes on Top 50 Consolidated Businesses.

Entry 91: Flamingo Research is part of Omnicom/DAS. See also Entry 21 in Notes on Top 50 Consolidated Businesses.

Entry 93: MARU Matchbox is part of MARU Group, which was acquired in the last quarter of 2022 by Stagwell, a marcoms network.

Entry 96: Nielsen Netratings is part of Nielsen Global Media. See also Entry 26 in Notes on Top 50 Consolidated Businesses.

TOP 50 CONSOLIDATED BUSINESSES

Entry 1: Kantar is 60% owned by US private equity group Bain Capital and 40% by WPP plc. See also Note on Entry 1 in Notes on Top 100 Individual Agencies.

Entry 2: Ipsos – see Entry 2 in Notes on Top 100 Individual Agencies.

Entry 4: Wood Mackenzie – In late 2022 Verisk sold Wood Mackenzie to technology investor Veritas Capital.

Entry 5: Dunnhumby is wholly owned by Tesco plc.

Entry 8: GlobalData – this adjusted entry more accurately reflects UK-based turnover than in previous editions of the league tables.

Entry 11: FastMarkets – At the end of 2022 Euromoney Institutional Investor plc (the owner of FastMarkets) was acquired by a private equity consortium. Within that, FastMarkets will become a standalone entity controlled by Paris-bases private equity firm Astorg Asset Management.

Entry 13: Information Resources merged with NPD Group in March 2023 to form CIRCANA.

Entry 15: Nielsen IQ merged with GfK in mid-2023 and rebranded as NIQ.

Entry 16: GfK merged with Nielsen IQ in mid-2023 and rebranded as NIQ.

Entry 19: Ascential includes WGSN (a trend forecasting company) and Edge by Ascential (formerly Planet Retail). In late 2023 it was announced that Ascential would be broken up into three parts, with the two subsidiaries above being sold to private equity firms.

Entry 21: Omnicom/DAS includes Hall & Partners, C Space, Flamingo Research, Adelphi International Research, The Planning Shop International. In early 2023, Hall & Partners and C Space were acquired by Escalent (formerly known as Market Strategies International-Morpace).

Entry 22: Dynata Global is majority owned by Court Square Capital Partners and HGGC. At the end of 2021 Dynata acquired Optimus, which combines data science, predictive analytics, and software solutions to target advertising and develop growth of brands.

Entry 26: Nielsen Global Media includes Nielsen Media Research, Advertising Intelligence, Netratings, Nielsen Sport, Nielsen Book Services.

Entry 27: STRAT7 Group includes Incite, Jigsaw, CrowdDNA, Researchbods, Bonamy Finch and other small businesses.

Entry 29: Cello Health includes Cello Health Insight and 2CV. In 2022 private equity firm Arsenal Capital integrated Cello Health with other (non-research) businesses into Lumanity.

Entry 30: The parent of CRU International is Commodities Research Unit International (Holdings) and the ultimate owner is Mattelisa Ltd (registered in Jersey).

Entry 31: Kantar Public was sold by Kantar at the end of 2022 to private equity group Trilantic Europe. It was renamed VERIAN in November 2023. See also Entry 1 in Notes on Top 100 Individual Agencies.

Entry 32: MMR Group has two principal UK-based businesses within its market research services division – MMR Research Worldwide and Healthcare Research Worldwide.

Entry 33: OMDIA is the sole remaining Informa subsidiary in the league tables, and therefore qualifies for an entry in its own right in the Top 50 Table.

Entry 34: Medallia is a customer experience management specialist. In early 2021 it acquired UK-based Decibel Insight which deploys machine learning to identify problem areas on websites and apps. At the end of 2021 Medallia was itself acquired by software investment company Thoma Bravo.

Entry 35: Toluna Group consists of Toluna, Harris Interactive, and KuRunData (Chinese online research). In 2023 it acquired MetrixLab. The group is privately owned.

Entry 37: Savanta is the insights and intelligence division of Next Fifteen Communications plc.

Entry 41: Yonder Consulting is now a single unibrand business encompassing Yonder Consulting, Yonder Data Solutions, Decidedly, and BrandCap.

Entry 42: Economist Intelligence / EIU is the research and analysis division of The Economist Group.

Entry 43: The principal UK-based businesses within Basis Research Group are Basis Research, Basis Health London, and Basis Social.

Entry 44: BVA-BDRC Group consists of BVA-BDRC, ESA Retail, Perspective Research Services. Alligator Digital, and Viewpoint.

Entry 48: InSites Consulting turnover includes the impact of acquisition of Space Doctors. In March 2023 InSites Consulting was re-named as Human8.

Entry 50: IHS Markit Economics became part of S&P Global Market Intelligence at the end of February 2022.

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GENDER PAY GAP IN THE UK RESEARCH SECTOR

David Cahn, principal, synygis consulting

The UK research industry's Gender Pay Gap of +13.3% continues to be narrower than the national average of 14.3%. The research gap has improved for females since the start of mandatory reporting in 2018.[1]

The Gender Pay Gap is the difference between average male and average female pay in an organisation. The Gender Pay Gap is not the same as unequal pay, where males and females are paid differently for performing the same, or similar, work; (unequal pay has been unlawful since 1970).

GENDER PAY GAP IN THE
UK RESEARCH SECTOR

In April 2018, companies with more than 250 employees were required for the first time to publish their Gender Pay Gap. Mandatory Gender Pay Gap reporting was paused in 2020 in response to the Covid pandemic and re-started in 2021.

For the reporting year 2021-2022, 10,787 employers submitted Gender Pay Gap returns, among them 33 research organisations.

THE GENDER PAY GAP IN THE UK

The national Gender Pay Gap for 2023 was +14.3% among all UK employees, i.e., hourly pay for females was 14.3.% lower than for males, meaning females earn 85.7p for every £1 that men earn when comparing hourly pay.

This represents an improvement on the +14.9% national gap for 2022, and a definite advance on the gap seen for 2018 (+17.8%), when mandatory reporting for larger companies commenced.

Longer term, the national Gender PayGap has been declining steadily over time; over the last twenty-five years it has fallen by nearly 50% among all UK employees.[2]

THE GENDER PAY GAP AMONG RESEARCH COMPANIES: 2023

The 33 research firms who made a Return for 2022-2023 had a Gender Pay Gap of +13.3%, discernibly less unfavourable to females than the national average of +14.3%.

Two research organisations, Merkle Three (–14.3%) and NatCen (–3.0%), reported an hourly pay gap in favour of females, while another two claimed hourly pay parity between females and males. Across the other 29 research companies, the hourly pay gap favoured males. This is broadly consistent with the proportions for all 10,787 companies reporting in 2023 – 13% with a Gender Pay Gap in favour of females, 8% at parity, and 79% with a gap in favour of males.

The gap for bonus pay among research companies was rather less female-friendly -+28.5% in favour of males. Just two companies returned a bonus pay gap in favour of females (Nice Systems [–9.1%], and Merkle Three [–8.1%]); however, five companies (BMG, Dunnhumby, NatCen, UK Stats Authority, and Walnut) reported no difference between female and male bonus pay. The male-oriented bonus gaps ranged from +11.5% (Neilsen) to +67.2% (Global Data).

On the other hand, the percentage being awarded a bonus at all was balanced much more evenly by gender. Among females, 57.0% were in receipt of a bonus (males, 58.3%), much higher than the national average of 37.9%, and 19 of the 33 returning research organisations awarded a bonus to as many, or more, of their females as their males.

Research companies employ a slightly lower proportion of females than the 10,787 larger companies reporting in 2023 (46.6% vs.48.3%), and also slightly fewer females in the top pay quartile (37.8% vs 41.1%).

GENDER PAY GAP IN THE UK RESEARCH SECTOR

THE GENDER PAY GAP AMONG RESEARCH COMPANIES: MOVEMENT OVER TIME

28 research companies reported for both 2022-2023 and 2021-2022. The Gender Pay Gap for this group slightly narrowed year to year, (+13.1% in 2023 versus +14.0% in 2022).

22 research organisations reported for 2022-2023 and also for 2017-2018, (the first year of direct reporting for larger companies and also pre-pandemic). Their Gender Pay Gap narrowed to +15.4% for 2022-2023 from +16.4% for 2017-2018.

Between 2017-2018 and 2022-2023, 11 research companies improved female pay year on year by shrinking the pay gap in favour of males, while 9 oversaw a deterioration in female pay by expanding the Pay Gap in favour of males.[3]

The three companies achieving the largest narrowing of the pay gap between 2018 and 2023 were Yougov (+7%, narrowing by -21.7%), Circana (+25.9%, narrowing by -13.2%), and Verint Systems (+16.7%, narrowing by -12.7%).

Taken as a whole, female representation both overall, or in the top pay quartile, improved slightly among the 22 research companies reporting in both 2023 and 2018. 10 research companies managed to increase the proportion of females in the top pay quartile over the four-year period, while 10 companies also grew their proportion of female employees overall.

OTHER PAY GAP REPORTING

Four research companies are continuing to publish their Pay Gap for Ethnicity – Ipsos, YouGov, and Merkle One and Merkle Three (who also provide their LGBTQ+ pay gap).

[1] The gender pay gap is calculated as the difference between average earnings (excluding overtime) of men and women as a proportion of average earnings (excluding overtime) of men. The two most commonly discussed gaps are for average hourly earnings and for bonus pay. For example, a +10% gender pay gap in hourly pay denotes that women earn 10% less, on average, than men. Conversely, a -10% gender pay gap in hourly pay denotes that women earn 10% more, on average, than men. There are at least two ways to calculate average earnings – the mean average and the median average (the mid-point when individual earnings are ranked by value). The Office for National Statistics (ONS) recommends the median for average earnings as it is less affected by the potentially disproportionate impact of very high earners.

[2] The Annual Survey of Hours and Earnings (ASHE) provides the reference source for the gender pay gap across all UK employers, irrespective of size. ASHE is based on a 1% random sample of all employee jobs registered to PAYE schemes, with 156,000 responses analysed in 2023.

[3] Two organisations reported a 0% gap in both years.

TAKEN AS A WHOLE, FEMALE REPRESENTATION BOTH OVERALL, OR IN THE TOP PAY QUARTILE, IMPROVED SLIGHTLY AMONG THE 22 RESEARCH COMPANIES REPORTING IN BOTH 2023 AND 2018.

GENDER PAY GAP IN THE UK RESEARCH SECTOR

INDIVIDUAL CALCULATIONS FROM RESEARCH COMPANY RETURNS

	% DIFFERENCE IN HOURLY RATE (MEDIAN) 2023	% DIFFERENCE IN BONUS PAY (MEDIAN) 2023	% WHO RECEIVED BONUS PAY (MALES) 2023	% WHO RECEIVED BONUS PAY (FEMALES) 2023	% FEMALES IN LOWER PAY QUARTILE 2023	% FEMALES IN LOWER MIDDLE PAY QUARTILE 2023	% FEMALES IN UPPER MIDDLE PAY QUARTILE 2023	% FEMALES IN TOP PAY QUARTILE 2023	TOTAL FEMALES 2023
Research Companies Reporting Gender Pay Gap 2023 (n=33)	13.3%	28.5%	58.3%	57.0%	54.2%	48.8%	45.4%	37.8%	46.6%
Average for All Companies Reporting Gender Pay Gap 2023 (n=10,787)	12.0%	6.3%	38.7%	37.9%	54.9%	50.7%	46.3%	41.1%	48.3%
National Average 2023 ASHE 2023 (n=156,000)	14.3%								
Merkle Three	-14.3%	-8.1%	25.0%	31.3%	45.0%	50.0%	58.0%	57.0%	52.5%
National Centre for Social Research	-3.0%	0.0%	13.0%	18.0%	50.0%	50.0%	61.0%	73.0%	58.5%
IFF Research	0.0%	27.8%	14.7%	11.5%	57.0%	50.0%	59.0%	58.0%	56.0%
Sensory Dimensions	0.0%	51.2%	3.5%	12.7%	66.0%	72.0%	100.0%	45.0%	70.8%
Perspective Research Services	0.2%	17.7%	28.2%	24.5%	71.8%	64.1%	64.1%	50.6%	62.7%
BMG Research	0.5%	0.0%	0.0%	0.0%	57.0%	56.0%	51.0%	54.0%	54.5%
UK Statistics Authority	0.9%	0.0%	80.1%	83.4%	58.8%	61.8%	57.3%	49.7%	56.9%
InteractCC	2.7%	29.7%	84.1%	86.4%	51.9%	47.0%	42.4%	40.9%	45.6%
Kantar	3.0%	20.0%	29.0%	30.0%	50.0%	47.0%	48.0%	42.0%	46.8%
Nielsen	4.3%	11.5%	58.0%	59.0%	51.0%	58.0%	51.0%	47.0%	51.8%
Medallia	6.0%	47.0%	95.3%	98.9%	49.0%	31.0%	41.0%	33.0%	38.5%
YouGov	7.0%	37.0%	62.0%	57.0%	48.0%	45.0%	43.0%	38.0%	43.5%
Ipsos	8.3%	25.0%	44.0%	41.0%	43.0%	37.0%	38.0%	52.0%	42.5%
Quantexa	10.1%	19.0%	62.4%	57.5%	27.4%	27.4%	23.8%	15.5%	23.5%
Euromonitor International	11.2%	48.2%	74.0%	79.0%	59.0%	58.0%	50.0%	50.0%	54.3%
IQVIA LTD	11.8%	48.2%	67.4%	67.8%	59.6%	59.1%	51.8%	44.2%	53.7%
Savanta group	13.2%	14.1%	95.6%	82.4%	65.0%	43.0%	49.0%	35.0%	48.0%
Nice systems	14.3%	-9.1%	88.0%	77.0%	39.4%	27.3%	21.2%	25.8%	28.4%
Verint systems	16.7%	14.4%	81.0%	84.0%	34.2%	24.1%	20.3%	18.3%	24.2%
CACI	16.8%	25.9%	79.7%	67.2%	35.0%	35.0%	22.0%	18.0%	27.5%
Merkle One	19.6%	54.0%	37.8%	31.5%	49.0%	37.0%	34.0%	21.0%	35.3%
Markit Group	20.3%	29.6%	93.3%	90.3%	44.6%	26.8%	28.0%	20.3%	29.9%
Global Web Index (Trendstream)	23.0%	60.0%	75.0%	76.0%	59.2%	55.7%	41.4%	35.7%	48.0%
Gartner U.K.	23.3%	58.5%	99.0%	100.0%	53.0%	48.0%	41.0%	23.0%	41.3%
Evaluate	24.0%	26.0%	100.0%	100.0%	54.0%	45.0%	33.0%	33.0%	41.3%
Mintel	24.4%	22.6%	51.2%	48.9%	65.7%	59.0%	44.8%	38.1%	51.9%
Dunnhumby	24.7%	0.0%	15.0%	15.0%	69.0%	53.0%	50.0%	35.0%	51.8%
Informa PLC	25.2%	50.5%	73.4%	74.9%	69.7%	64.4%	52.8%	36.7%	55.9%
Circana (UK)	25.9%	40.4%	87.9%	91.9%	63.6%	52.2%	44.4%	34.1%	48.6%
Wood Mackenzie	26.0%	50.0%	80.0%	78.0%	60.0%	43.0%	32.0%	21.0%	39.0%
GlobalData	26.9%	67.2%	33.5%	22.6%	51.5%	43.7%	42.2%	20.4%	39.5%
GfK U.K.	33.6%	62.6%	76.4%	76.5%	48.0%	53.4%	29.1%	21.6%	38.0%
Walnut Unlimited	33.8%	0.0%	15.2%	7.2%	83.0%	88.0%	73.0%	61.0%	76.3%

COMPARISON OF RESEARCH COMPANY RETURNS 2023 VS 2018

	% DIFFERENCE IN HOURLY RATE (MEDIAN) 2023	% DIFFERENCE IN HOURLY RATE (MEDIAN) 2022	2023 VS 2022 MEDIAN PAY GAP	% DIFFERENCE IN HOURLY RATE (MEDIAN) 2018	2023 VS 2018 MEDIAN PAY GAP	% FEMALES IN TOP PAY QUARTILE 2023	TOTAL FEMALES 2023	% FEMALES IN TOP PAY QUARTILE 2018	TOTAL FEMALES 2018	2023 VS 2018 FEMALES IN TOP PAY QUARTILE	2023 VS 2018 TOTAL FEMALES
Research Companies Reporting Gender Pay Gap 2023 (n=33)	13.3%										
Research Companies Reporting Gender Pay Gap 2023 and 2022 (n=28)	13.1%	14.0%	-0.9%								
Research Companies Reporting Gender Pay Gap 2023 and 2018 (n=22)	15.4%			16.4%	-1.0%	39.4%	48.1%	39.3%	50.0%	0.1%	-1.9%
Average for All Companies Reporting Gender Pay Gap 2023 and 2018	9.2%			9.7%	-0.5%	41.1%	48.3%	39.2%	46.8%	1.9%	1.5%
National Average (ASHE)	14.3%	14.9%	-0.6%	17.8%	-3.5%						
Merkle Three	-4.4%	4.8%	-9.2%	n/a	n/a	57.0%	52.5%	n/a	n/a	n/a	n/a
National Centre for Social Research	-3.0%	-16.0%	13.0%	-15.0%	12.0%	73.0%	58.5%	75.0%	64.8%	-2.0%	-6.3%
IFF Research	0.0%	0.0%	0.0%	0.0%	0.0%	58.0%	56.0%	49.0%	56.2%	9.0%	-0.2%
Sensory Dimensions	0.0%	0.0%	0.0%	0.0%	0.0%	45.0%	70.8%	91.0%	78.0%	-46.0%	-7.3%
Perspective Research Services	0.2%	4.3%	-4.2%	0.3%	-0.2%	50.6%	62.7%	54.5%	55.1%	-3.9%	7.5%
BMG Research	0.5%	6.3%	-5.8%	n/a	n/a	54.0%	54.5%	n/a	n/a	n/a	n/a
UK Statistics Authority	0.9%	10.6%	-9.7%	10.9%	-10.0%	49.7%	56.9%	43.0%	54.8%	6.7%	2.1%
InteractCC (73200)	2.7%	1.7%	1.0%	n/a	n/a	40.9%	45.6%	n/a	n/a	n/a	n/a
Kantar	3.0%	9.0%	-6.0%	n/a	n/a	42.0%	46.8%	n/a	n/a	n/a	n/a
Nielsen	4.3%	5.9%	-1.6%	6.2%	-1.9%	47.0%	51.8%	42.0%	49.5%	5.0%	2.3%
Medallia	6.0%	15.5%	-9.6%	n/a	n/a	33.0%	38.5%	n/a	n/a	n/a	n/a
YouGov	7.0%	11.0%	-4.0%	28.7%	-21.7%	38.0%	43.5%	22.0%	42.0%	16.0%	1.5%
Ipsos	8.3%	8.4%	-0.1%	-0.9%	9.2%	52.0%	42.5%	43.5%	52.0%	8.5%	-9.5%
Euromonitor International	11.2%	17.5%	-6.3%	21.6%	-10.4%	50.0%	54.3%	41.0%	51.8%	9.0%	2.5%
IQVIA LTD	11.8%	16.6%	-4.8%	22.2%	-10.4%	44.2%	53.7%	44.9%	61.9%	-0.7%	-8.3%
Verint systems	16.7%	21.9%	-5.2%	29.4%	-12.7%	18.3%	24.2%	13.0%	23.3%	5.3%	0.9%
CACI	16.8%	21.3%	-4.5%	26.5%	-9.7%	18.0%	27.5%	18.0%	26.8%	0.0%	0.7%
Merkle One	19.6%	21.1%	-1.5%	n/a	n/a	21.0%	35.3%	n/a	n/a	n/a	n/a
Markit Group	20.3%	19.0%	1.3%	23.2%	-2.9%	20.3%	29.9%	28.0%	38.3%	-7.7%	-8.3%
Gartner U.K.	23.3%	27.8%	-4.5%	31.8%	-8.5%	23.0%	41.3%	20.0%	43.0%	3.0%	-1.8%
Mintel Group	24.4%	30.2%	-5.8%	12.4%	12.0%	38.1%	51.9%	37.6%	49.6%	0.5%	2.3%
Dunnhumby	24.7%	21.1%	3.6%	19.9%	4.8%	35.0%	51.8%	24.5%	42.0%	10.5%	9.7%
Informa PLC	25.2%	24.4%	0.8%	21.5%	3.7%	36.7%	55.9%	37.3%	54.6%	-0.6%	1.3%
Circana (UK)	25.9%	25.7%	0.2%	39.1%	-13.2%	34.1%	48.6%	37.8%	52.5%	-3.7%	-3.9%
Wood Mackenzie	26.0%	22.0%	4.0%	25.8%	0.2%	21.0%	39.0%	19.0%	36.8%	2.0%	2.3%
GlobalData	26.9%	20.2%	6.7%	14.8%	12.1%	20.4%	39.5%	20.9%	35.4%	-0.5%	4.1%
GfK U.K.	33.6%	28.8%	4.8%	22.0%	11.6%	21.6%	38.0%	29.0%	46.8%	-7.4%	-8.7%
Walnut Unlimited	33.8%	13.7%	20.1%	20.0%	13.8%	61.0%	76.3%	74.0%	86.0%	-13.0%	-9.7%

Pledge to make a difference in 2024

A manifesto for sustainability

The research sector is taking steps to be part of the solution to the growing climate emergency.

✓ **Delivering net zero by 2026**

✓ **Publishing carbon emissions**

Sign up to the MRS Net Zero pledge

Manifesto for Sustainability

MRS Net Zero Pledge

The NetZero pledge has been signed by:

- 7th Sense Research UK Ltd
- Accent Marketing & Research
- Any-3 Ltd
- B2B International a Trading Division at Dentsu UK LTD
- BAMM London
- Bayes Price
- Behaviorally UK, Ltd
- Blue Marble Research
- BMG Research Ltd
- Boxclever
- Bulbshare
- BVA BDRC
- Citrine Research
- Cobalt Sky
- Cogco (Cognition Company)
- Community Research
- Context Consulting
- Critical Research Ltd
- Deep Blue Thinking Ltd
- Differentology Ltd
- DJS Research Ltd
- Echo Research Limited

- Empower Translate (Global) Limited
- Engine Rooms
- England Marketing
- Enventure Research
- Firefish Ltd
- FlexMR
- Focaldata
- Freshwater Strategy
- GfK UK Limited
- Glow UK Hub Ltd
- Harlow Consulting Services Ltd
- Helix Research and Evaluation
- Human8
- i-view London Ltd
- IFF Research Ltd
- Impact Research Ltd
- IndustryLine Research Ltd
- Insight Now (OrbitaCX Limited)
- Ipsos UK
- LDA Research Ltd
- Levercliff Associates

- Mathematical Market Research Ltd
- Mindlab International Ltd
- MIS Group Intl. Ltd
- MM-Eye
- Monkey See Ltd
- Morris Hargreaves McIntyre
- mTab
- MTM
- Naked Eye
- Ninth Seat
- Norstat UK LTD
- Obsurvant
- Opinion Research Services Ltd
- Opinium
- People For Research
- Potentia Insight Ltd
- Progressive Partnership Ltd
- Quadrangle
- RED C Research UK Ltd
- Research Academy
- Sanctuary Search Ltd
- Sapio Research
- Savanta Group Limited

- Service Insights Ltd
- Shift Insight
- SMSR Ltd
- Solutions Strategy Research Facilitation Ltd
- Strategic Research and Insight Ltd
- SYSTRA Ltd
- The Behavioural Architects
- The Crow Flies Limited
- The Leadership Factor Ltd (TLF)
- The Nursery Research & Planning
- The Survey Initiative
- The Young Foundation
- Thinks Insight & Strategy
- Verve
- Vision One Research Limited
- Walnut Unlimited
- WALR Group
- Watch Me Think
- Wavehill
- Winning Moves Ltd
- Yonder Consulting Limited
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STRENGTHS AND CHALLENGES: MAKING SENSE OF IT ALL

Katie McQuater, Editor, Research Live & Impact magazine

Research agencies and clients alike are still operating, to a certain extent, in a state of 'business unusual', due to continued economic uncertainty. However, there is clear optimism in the sector. New stakeholders, blended insight and the advent of generative artificial intelligence all represent a mix of challenge and opportunity for the sector, with collaboration and co-creation seen as key to future success. Katie McQuater speaks to agencies and clients to find out what's on the horizon for 2024.

The last few years have shown that while times may be turbulent, there remains a strong demand for insight, as challenging markets require decisiveness from organisations.

What's more, different people within organisations are seeking insight, creating more opportunities for research businesses, according to Tom Smith, chief executive at GWI. "The tougher macroeconomic conditions have undoubtedly had an impact; however, at the same time, we're seeing more and more roles within businesses – not just expert researchers and analysts – requiring easy access to consumer insights," he says. "In a tough market, brands don't stop looking to understand their consumers. In fact, they need to understand their customers and changes to their behaviours and outlooks with even more depth. Of course, they want to do it in a more cost-effective and efficient way, but hitting the right note with consumers is never more important than when spending is being so heavily scrutinised."

Smith adds: "I strongly believe that the winners will be those that invest in user centricity that allows consumer and market research to be a normal and valuable part of people's workflows."

A key driver of GWI's growth has been that brands need "a global view of digital consumers at speed," says Smith, including a demand for global data on a wide range of markets. GWI has continued to increase its footprint to include local markets that are not often well represented, with Croatia being one of the most recent additions.

"DIFFERENT PEOPLE WITHIN ORGANISATIONS ARE SEEKING INSIGHT."
TOM SMITH, CHIEF EXECUTIVE, GWI

Camille Nicita, global chief executive at Human8 (formerly InSites Consulting), hints at the shift towards a broadened insights scope, noting that the business is increasingly taking extra steps to understand the needs of other stakeholders. The stakeholders exist beyond insight teams within a client business – something she says "creates higher potential for insights to drive true momentum in the market".

Those stakeholders vary depending on the business, but, says Nicita, often represent marketing, strategy, innovation and experience design. To address this, Human8 has employed people from outside of the insights industry – business and brand strategists, designers and human-centred innovation people.

While Nicita says Human8 has experienced an increased demand for insights and guidance to "navigate uncertainties and changes," on the other hand, she says: "There's also a share of clients facing significant budget constraints which we've, for instance, seen reflected in clients attempting to centralise insight services with one partner to negotiate more effectively on budget or even in-source some of the services that agencies provide. As a global business, we're in a strong position to respond to market volatility with our portfolio."

For Firefish, integrated work combining human insight, cultural strategy and data has been popular in the last year, according to Martyn Hill, business development director. The business has undertaken 'masterclasses' within its various internal units across qual, quant, analytics and cultural strategy, with the aim of understanding more about individual specialist teams, in order to tell better integrated stories from the data. Hill says: "We like to say that 'data informs but stories inspire', and that has been ever-more important in a world where more data than ever before is being produced."

Firefish is also having regular conversations with clients to gauge how they are feeling – and, with AI making an impression – how they are coping in what Hill terms a "post-ChatGPT world". He says: "It appears many are just trying to make sense of it all, alongside bigger changes in regulations from consumer duty in financial services, to a cookie-less and privacy-concerned world for our tech clients. It seems like it has been a turbulent time for everyone, but I expect that to settle down a little in 2024."

Walnut Unlimited managing director Jane Rudling also points to an increase in "blended methodologies". This could include, for example, "combining behavioural science with qual and neuroscience to give a deeper understanding of the business problem and how to solve it". Or having the data science team explain what is happening, and then the qual team explain why – "this works really well for our hybrid segmentations," says Rudling.

Business conditions in the sector were "erratic" in 2023, with lots of ups and downs, says Rudling. An unpredictable wider business landscape presents both challenges and opportunities: "Our clients are navigating a difficult economic climate, supply chain issues, upheaval due to the continuing war in Ukraine and the recent turmoil in the Middle East. Our clients have decisions to make, and they need insight to help support those decisions," says Rudling. "It can make it very hard to plan for the year ahead, but we can be sure that our clients will need insight to guide their decision-making. In an uncertain world, insight is more important than ever."

At Strat7, growth has been significantly driven by international expansion, particularly in the US market. Across all regions, says chief executive Barrie Brien, the group's agencies have made "concerted efforts" to get closer to their clients to help them adapt to ever-changing markets.

"WE LIKE TO SAY THAT 'DATA INFORMS BUT STORIES INSPIRE'."
MARTYN HILL, BUSINESS DEVELOPMENT DIRECTOR, FIREFISH

Brien adds: "Central to this has been bringing in additional capabilities from across the network to address clients' specific business challenges. This has been a core strategy as we appreciate the strengths and depth of our relationships are key."

Brien agrees 2023 has been challenging, with market research budgets tightening. But he adds: "Viewing insight as optional is imprudent. Rapid changes in consumer needs and behaviours, driven by factors like inflation, climate, and technology, demand proactive corporate leadership for sustained growth. Central to this is placing customers at the core of digital transformation, using data infrastructures to monitor and respond to evolving needs. And that requires investment in next-generation data collection and analytics."

THE CLIENT VIEW

Speaking with client-side insights professionals gives an appreciation of the other side of the coin. So firstly, what has worked well for clients in the past year? Seema Hope, who joined The Economist as global head of consumer research at the start of 2023, says working closely with "an excellent data team" has worked well, for both teams: "Our research enriches the data, and the data enriches our research," she says.

Another big focus, says Hope, has been integrating principles of user experience and market research across strategic projects, while establishing processes to ensure the team "feels confident in understanding how different methodologies can work together".

In the face of continued uncertainty, for Mattel, 2023 led to a stronger focus on shoppers, says Michael Swaisland, head of insight and analytics EMEA. The business has placed a firmer emphasis on mindsets, drivers and behaviours, and "thinking about how to get messaging through in a very value-conscious environment," he says.

"OUR RESEARCH ENRICHES THE DATA, AND THE DATA ENRICHES OUR RESEARCH."
SEEMA HOPE, GLOBAL HEAD OF
CONSUMER RESEARCH, THE ECONOMIST

What is the key challenge for client insight teams as we enter 2024? Nick North, director of audiences at the BBC, says: "In an increasingly complex and data-noisy world, we need to make sure the business is led by the most valuable insight 'signals'. Rarely are decisions now founded on single data points. This means synthesising, integrating and making sense of multiple data sources to deliver insight. Turning that insight into action requires more effective communication, to cut through the noise. Where there's both a challenge and an opportunity is how we make best use of new technologies, new capabilities afforded by GPTs, for example, to transform the insight generation and communication process."

The ongoing cost-of-living crisis, and its impact on consumers, can't be underestimated, says Claire Rainey, head of insight, Virgin Media O2. "It is a very tough trading climate for many industries, and this has led to changes in consumer habits and choices. The wealth gap in the UK society feels wider than ever, and as this grows and needs diversify, we need to meet consumers across a growing spectrum of requirements," she says.

The question of impact continues to be a key challenge for insights teams, says Swaisland. "In any business, the challenge will always be, are we driving enough impact? Are we being provocative enough to shape the narrative? Are we helping teams to pivot in time? Are we calling out better ways to focus limited resources? Are we ensuring that actions are consumer and society centric, rather than internally focused and biased? We need to be continually breaking through at all levels within the organisation, with a strong point of view, and even stronger determination to be heard."

One of the biggest challenges – and opportunities – across the board for clients and suppliers is, of course, artificial intelligence. Since the launch of OpenAI's ChatGPT in November 2023, research businesses have been experimenting with how to apply generative AI to their work, and most of the contributors to this report mentioned it as a key challenge for the sector to navigate in the year ahead.

"A lot of conversation involves AI or an element of automation," says Hope. "The challenge will come from really understanding the short- and medium-term impact of AI, how to talk confidently about AI (now) and make time for the learning that will be required."

"WE NEED TO BE CONTINUALLY BREAKING THROUGH AT ALL LEVELS WITHIN THE ORGANISATION, WITH A STRONG POINT OF VIEW, AND EVEN STRONGER DETERMINATION TO BE HEARD."
MICHAEL SWAISLAND, HEAD OF INSIGHT AND ANALYTICS EMEA, MATTEL

Diana Mitkov, senior insight manager at De Beers, says: "In this space, it will be essential to understand how best to use the new tools and methods without over-relying on them, but also without missing out on positive developments. So, staying abreast of this fast-moving area will be a must."

Many clients want their agencies to act as partners to the business to help them navigate these challenges. Mitkov says the most valuable qualities in an insights supplier are willingness and "capability to understand my business and to work alongside me as insight partners, rather than just data providers". This requires a high level of involvement and curiosity about the client business and industry, she adds.

Rainey says she looks for insight suppliers who are "very clear, concise and responsive" and adds: "I appreciate suppliers who are willing to challenge and build on ideas throughout. The process should be joint and co-creative and not a passing of tasks from one party to another. It should feel like an extension of the team."

The threat of reduced research budgets looms over clients in 2024, with many facing challenges over the value the insight will have – and what the return on investment will be. However, notes Rainey: "It is our job to be clearer than ever on this and demonstrate the returns our insights drive."

"IT IS OUR JOB TO BE CLEARER THAN EVER...AND DEMONSTRATE THE RETURNS OUR INSIGHTS DRIVE."
CLAIRE RAINEY, HEAD OF INSIGHT, VIRGIN MEDIA O2

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PROCEED WITH CAUTION

Deborah Lewis, Managing Director, Resources Group UK

The post–Covid period was a unique 'moment in time' in the market research recruitment business, with companies restaffing and recruiting for growth. However, late 2022 saw a sharp slowdown, with core vacancies filled and speculative appointments declining along with business confidence.

The research sector was not alone. The KPMG and REC, UK Report on Jobs noted "Permanent staff vacancies decreased in five of the 10 broad employment categories during September," market research being in one of the five.

2023 has seen fewer vacancies, some recruitment freezes and even a few redundancies. The silver lining is that if you need to hire, now is a good time - fewer companies competing for talent, more candidates jobhunting, and a growing understanding among candidates that some salaries have perhaps been artificially high.

Equally, this type of market benefits some candidates. There is always a demand for good people and when vacancies are in short supply, the best rise to the top. And there is always demand for 'hard to fill' roles for people with specific skillsets, including early embracers of AI.

There are more mid-level (senior research executive or research manager) than junior vacancies, which can be explained by the tightness of recruitment budgets and the risk of taking more senior staff away from research for training.

The attendant shortage of more senior roles reflects the industry's uncertainty about the future and the reluctance to branch out into new markets at a time of economic downturn. And the cost-of-living crisis is having an impact across all sectors, with budgets squeezed and less market research commissioned.

So what's in store in '24? We suggest 'caution tinged with optimism' i.e. a tight market but with positive factors, namely:

– **The growth in AI** – early adopters in the research sector will benefit from powerful tools and capabilities previously unimaginable

– **Spring** - usually sees an uplift in spirits, new budgets at the start of the new financial year, and demand as firms plot their journey for the coming year

– **General Election** - an election can have a positive impact on business with a sense of renewal and general re-booting

– **Major sporting events** - the Olympics and the Euros bring not just a "feel good" factor but also increased marketing budgets and MR spend.

Ultimately, recruitment is driven as much by optimism, hope and positivity as by economics. We are all hoping for a greater supply of these in 2024!

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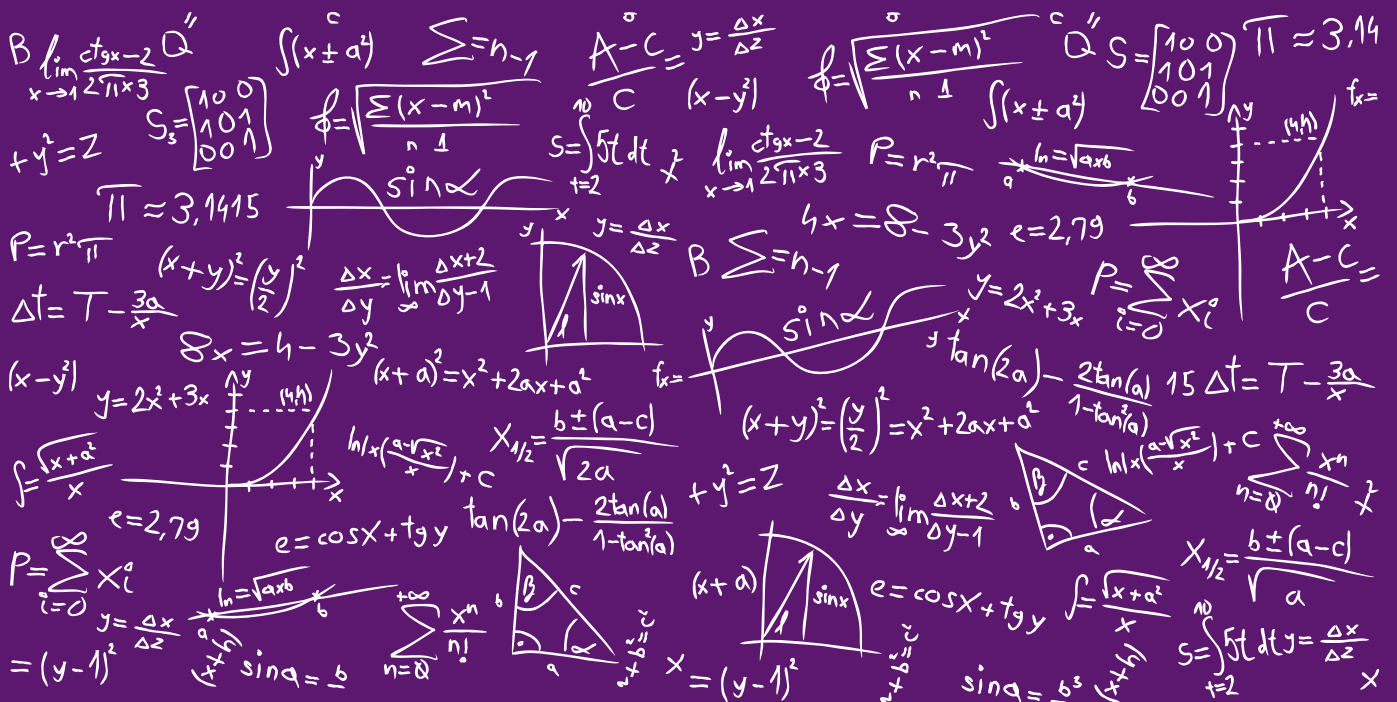
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MRS BUSINESS SENTIMENT MONITOR
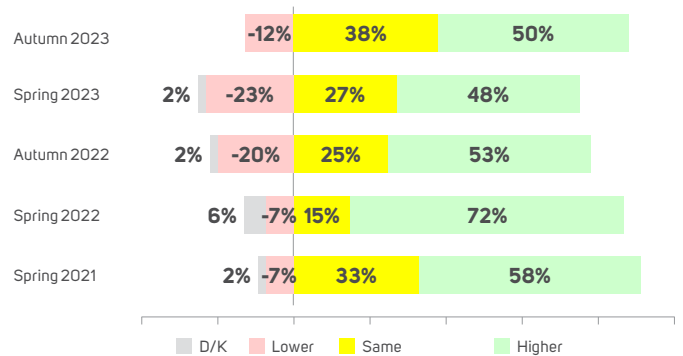
The bi-annual MRS Business Sentiment Monitor takes a snapshot of business owners' views on their business, the industry and the UK economy. The Monitor provides data with which to brief the UK government and comparable statistics against other European countries via the EFAMRO Moodindicator.[1]

The same measures of Company and Industry Expectations are also collected as part of the MRS Annual Surveys (which are conducted in spring each year), so are available for comparison.

For this wave of the Monitor, invitations were sent to 345 companies between 20 October and 6 November 2023, and 50 responses were received.[2] Of these, 35 reported annual turnover of up to £5mill, and 15, more than £5mill.[3]

COMPANY EXPECTATIONS

MY COMPANY REVENUES IN THE YEAR AHEAD

	D/K	Lower	Same	Higher
Autumn 2023		-12%	38%	50%
Spring 2023	2%	-23%	27%	48%
Autumn 2022	2%	-20%	25%	53%
Spring 2022	6%	-7%	15%	72%
Spring 2021	2%	-7%	33%	58%

50% (25 companies) anticipated a revenue increase next year, while 12% (6 companies) predicted a revenue decline. No change was expected by 38% (19 companies).

This is a distinct improvement on the pessimism, both six months and 12 months ago, when almost twice as many companies thought they would experience a decline in revenues.

The average percent revenue growth anticipated in the Spring was +2.4%, but has now somewhat improved to +3.0%.

MRS BUSINESS
SENTIMENT MONITOR

INDUSTRY EXPECTATIONS

THE INDUSTRY OVER THE NEXT 12 MONTHS

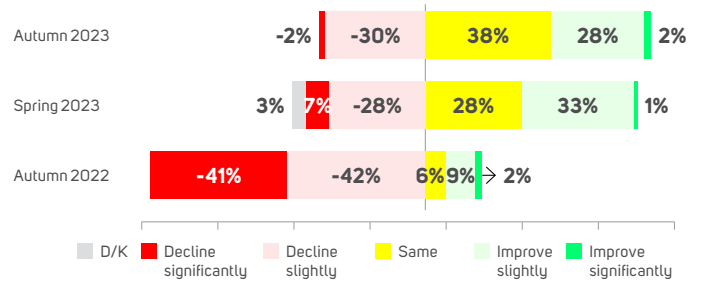|	D/K	Will decline	Same	Will grow
Autumn 2023		-24%	60%	16%
Spring 2023	8%	-20%	48%	24%
Autumn 2022	2%	-28%	50%	20%
Spring 2022	7%	-6%	36%	51%
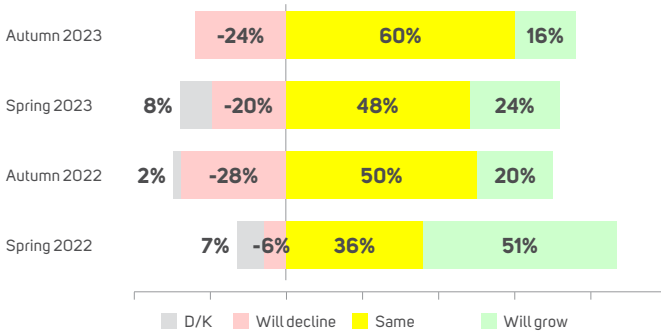
Nearly two thirds (30) companies now expect the industry not to change in size the next year, and only 16% (8 companies) do anticipate growth for the industry. Almost a quarter (12 companies) think the industry will decline.

Expectations for the industry were far more upbeat in Spring 2022, with 51% (27 participants) expecting the industry to grow over the next twelve months – the most bullish stance in the last five years. Only 6% (3 participants) thought the industry would shrink.

UK ECONOMY

THE UK ECONOMY OVER THE NEXT 12 MONTHS

	D/K	Decline significantly	Decline slightly	Same	Improve slightly	Improve significantly
Autumn 2023	-2%		-30%	38%	28%	2%
Spring 2023	3%	7%	-28%	28%	33%	1%
Autumn 2022		-41%	-42%	6%	9%	2%

Much as in spring 2023, two thirds (34 companies) expect the UK economy to remain as now or to improve slightly over the next year; while a third (15 companies) anticipate a slight decline.

Expectations about the UK economy have been transformed since a year ago. In autumn 2022, only 11% (7 companies) thought the UK economy would improve over the next 12 months, while 83% (53 companies) believed the economy would decline.

The next Business Sentiment Monitor is planned for Spring 2024, as part of the Annual Survey.

[1] Participants were asked: "Thinking about the year ahead, do you think your research revenues will be higher than, lower than, or about the same as [this year]?" "Looking at the research industry in the UK overall, what are your expectations over the next twelve months?", " Which of the following best describes your feeling about the overall UK economy in the next 12 months?"
[2] There will always be a tendency for those with a positive story to tell to respond more readily than those with a more pessimistic outlook.
[3] In Spring 2022, 42 of the 64 responders were in the under £5mill category.

ENTREPRENEURIAL SPIRIT

Katie McQuater, Editor, Research Live & Impact magazine

The UK research sector has a healthy proportion of independent insights consultants, many of whom are increasingly collaborating. Katie McQuater spoke to them to find out about the challenges 2023 brought for independents, whether the landscape has changed for sole traders, and what to expect from the research market in 2024.

"The Covid lockdowns opened many clients' eyes to the fact that you don't need to have a big glass and steel office to be effective," says Konrad Collao, founder of Craft. "It's noticeable how little I am questioned over my business model now compared to pre-pandemic."

While the independent and freelance model may be becoming more culturally accepted by client organisations, Collao still thinks there are barriers at "large corporate clients, who simply trust other large corporates – the big agencies – because they look and act like them. I'm reminded of the old adage: 'nobody ever got fired for hiring IBM'."

Ella Fryer-Smith, founder, Do You Research, thinks more clients are beginning to clearly recognise the value independent consultants can offer – particularly in groups of independents working together. "Often, independents have very specific areas of expertise and so being able to curate teams to meet niche project needs is a big plus. I've seen clients more proactively seeking out specialist input and actively encouraging smaller suppliers to bid for bigger pieces of work," says Fryer-Smith.

Shazia Ali, founder of Mint Research, believes the role of the independent insight consultant has been evolving for a few years. Budget allocation, a need for advanced skillsets and ability to adapt and be flexible have all played a part in this, she adds.

"An integrity and values driven approach allows for consultants to offer what clients are seeking more of in the current climate, which is collaboration, confidence, respect and honesty without compromise," explains Ali. "It's about having actionable conversations – not endless meetings."

Reorganisation of structures at some large clients in the last year has meant that independent consultants with long-term relationships with clients can play a bigger role in being "a guardian of institutional knowledge", says James McLintock, who runs insight freelancer collective Future Studio.

McLintock adds: "Insight buyers are under a lot of pressure, so the trend towards creating deliverables that can suit a variety of internal stakeholders' needs, and be more readily actionable, continues."

Clients are embracing working with independents, says McLintock. "The independent part of our sector offers a lot of flexibility, efficiencies and opportunities to access specialist skills. It's a great compliment to the scale and productised services that the agencies can offer, and it seems increasing numbers of clients are recognising that."

For Nick Bonney, founder, Deep Blue Thinking, there are three key reasons why independent researchers are attractive to brands: experience, flexibility and cost.

"Independent researchers tend to be more experienced and, as a client, you're getting to work with someone at a senior level throughout rather than tasks being delegated down to junior resource as you may find in a traditional agency model," says Bonney.

"Secondly, the engagement can be more flexible. I find we are working on a more continuous or partnership basis with clients rather than the debrief being the end of the project. Finally, we can't escape the fact that independents are often cheaper than bigger agencies – as a client you're not having to fund the shiny office or company away days, you're just paying for the know-how."

Collao also points to clients valuing the personal relationship they have with an individual, which is often based on a longstanding partnership. "In these cases, independent researchers (who also bring a level of seniority and business acumen, not just research skills) can often act more as evidence-led strategy consultants than purely 'researchers'," adds Collao.

Additionally, independents are often able to create bespoke teams under the direction of a senior researcher who will remain involved in the project from start to finish, says Collao. "This differentiates us from some agencies, where directors 'top and tail' projects (only appearing and being involved at the pitch and debrief), and where the project team is often decided by internal resourcing considerations (who has time), not suitability for the brief (who is best for the job)."

However, clients must establish whether they want more boutique service, which may not necessarily translate to a lower price, or whether they want a more cost-effective approach, he adds.

CHALLENGING ENVIRONMENT

A tough economic climate has brought specific challenges for independent researchers. "It's been a bit of a stop-start year due to various factors including the current economy, with clients stalling at times, and projects being pushed," says Fryer-Smith. "This can be harder to manage as a small agency or independent."

Collao says: "There does seem to be a slowdown in the market, so work is more difficult to come by. Thankfully I have strong relationships and benefit from a lot of repeat business, but even in these cases pitches are more competitive, budgets seem more likely to be pulled after pitches have been conducted or proposals have been written. It's taking longer to get projects signed off as there is more scrutiny on budgets."

Further evidence of a slowdown, adds Collao, is that he is receiving far more offers of availability from freelance researchers who work with agencies (as opposed to working directly with brands) than ever before.

Managing faltering commitment can be difficult, says McLintock. "We've been very lucky through what has been a difficult year for lots of independents and agencies, but it has been challenging staying positive when projects go from being a sure thing, to being delayed, to just disappearing, particularly if we're holding time for people to try and make something work. It's no one's fault obviously as it's ultimately an outcome of institutional pressures, but managing volatile levels of commitment to projects – when as independents we only get to sell our time once – has been frustrating at times."

Late payments have also become an increasingly pressing issue for freelancers, notes Bonney – costing independents in the time spent chasing payment. "I may be cynical but, as interest rates have risen, there is a greater incentive for businesses to hold cash reserves. As an independent it becomes so time consuming and utterly demoralising having to continue to chase to be paid – we don't have finance teams to do this for us so it has a direct impact on the amount of time we can spend on the real work."

LOOKING AHEAD

Bonney predicts the economic environment will continue to impact how research is commissioned in 2024, including longer wait times for decisions to be signed off, for example.

He adds: "The other broad theme is one of polarisation with growth in either the large-scale or the small and nimble. For example, more mid-sized agencies getting swallowed up into bigger 'groups' and smaller, more agile offerings continuing to thrive. Additionally, continued focus on speed and data integration in the 'big tech' side of the industry, but greater recognition that we are, at the end of the day a, people business and that's what creates value."

The trajectory of artificial intelligence has already impacted the research sector in the past year, since the advent of generative AI, which, along with other technologies, will weave itself into existing ways of working, says Ali. "The research industry landscape has never remained static – it can't. We are an industry that guides other sectors, and for that reason there's always been the need to be open minded, agile and keep developing. Quality and ethics will be ongoing conversations and areas of focus overriding the need for speed. The convergence of tech and human skills dialling up the best thinking will be important. It's one of the most exciting industries to be part of right now."

With AI expected to have a bigger impact on the industry in 2024, Fryer-Smith reaffirms the continued importance of independents having a point of difference: "I think researchers need to be clear on where and how they are bringing added value to clients, and again, this comes down to specialist knowledge and the power of collaboration."

"THE RESEARCH INDUSTRY LANDSCAPE HAS NEVER REMAINED STATIC – IT CAN'T."

SHAZIA ALI, FOUNDER, MINT RESEARCH

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LEARNING THE LANGUAGE OF TERRORISM

An interview with Dr Julia Ebner, Dr Chris Kavanagh & Prof Harvey Whitehouse

How intelligence services identify and assess online discourse that is likely to lead to real world violence is based on outdated approaches. Extremist behaviour online is increasingly fragmented, unpredictable and coded – it's a long way from the lists of proscribed terrorist organisations that have been the focus of surveillance in the past.

Terrorism prevention needs new approaches, and researchers from Oxford University have devised a novel and potentially more reliable diagnostic tool. Pictured is Prof Harvey Whitehouse and Dr Julia Ebner collecting the President's Medal 2024 which was awarded at the MRS Awards last December in recognition of their work.

Their approach builds on the pre-existing concept of 'identity fusion' – a very strong form of group binding in which members of a group feel they share the same essence. That sense of binding can be because they share genes in the case of close relatives, or they share life-defining experiences in the case of frontline fighters in a military organization. Extremist groups – from Qanon and far right groups to suicide bombers – are often fused with each other in much the same way, and this can provide the core motivation for carrying out acts of violence when they believe their groups are threatened.

Using Natural Language Processing (NLP), the researchers analysed manifestos and tracts from violent and non-violent groups, and compiled a lexicon of hate speech. The highest risk arose when individuals used language that indicted a potent combination called the 'fusion plus threat' model.

An example of this is the use of kinship words like 'brother', 'sister', 'motherland' which indicate fusion, combined with language which suggests an existential threat to the group (exposing theories like 'The Great Replacement'). Dehumanising and demonising language applied to the 'out-group' and violence condoning norms among members of the 'in-group' were additional statistically significant markers in the language of violent extremists.

In future, this linguistic framework could enable intelligence services and technology companies to anticipate violent intent more accurately than looking for explicit declarations of violence.

HOW DO YOU RECOGNISE IDENTITY FUSION IN LINGUISTIC TERMS – WHAT ARE THE SYMPTOMS?

Identity fusion manifests itself linguistically in the use of kinship terms or metaphors of shared blood. For example, fused individuals would refer to other members of their in-group as "family", "brothers" or "sisters".

TROLLING AND SATIRE ARE DEFINING ASPECTS OF INTERNET DISCOURSE – HOW DO YOU TAKE THAT INTO ACCOUNT?

Trolling and satire have made the work of intelligence agencies and tech firms more difficult because the lines have become blurry between actual threats of violence and satirical posts or trolling activities. Experts have called this phenomenon the "gamification" of radicalisation and terrorism. Our framework offers a solution to the challenges of gamified radicalisation, as it doesn't focus on threatening language as such but looks instead at deeper psychological patterns that are indicative of a deadly mindset.

DOES THIS HELP IDENTIFY POTENTIAL VIOLENT BEHAVIOUR FROM INDIVIDUALS NOT ASSOCIATED (FUSED) WITH GROUPS?

Our definition of groups draws on group psychology to explain violent extremism. It's important to emphasize that there may well be other factors that come into play, but which fall outside our framework. For example, some people who carry out murderous attacks that result in their own deaths may be motivated by individual pathologies rather than strong forms of group bonding. But since so many forms of intergroup violence seem to be best explained by the 'fusion plus threat' model, it's important to understand how that works and to use that knowledge to create more effective tools for early detection and prevention.

It's also important to understand that we don't view groups as being defined by the spaces or communication modes through which they operate but rather by the types of bonds between their members. For example, a loose community of online users may be a group (or in-group). As soon as there is a perceived in-group, identity fusion can occur and pave the way towards violence. We should note, however, that our analysis indicates that some individuals may move towards violent behaviour via different pathways. For example, violent misogynist Incel terrorists might be an important exception to our framework, as they don't tend to hold the same "us versus them" mindset but are often "loners" who are in a perceived battle again humanity.

ARE THERE GEOGRAPHICAL OR CULTURAL LIMITATIONS TO THIS APPROACH?

The 'fusion plus threat' model has been tested by Whitehouse's team in a great range of geographical and cultural settings – from insurgent groups in Libya to violent football fans in Brazil, and from Muslim fundamentalists in Indonesia to farmer-herder conflicts in Cameroon. The same fundamental group psychology appears to be universal and rooted in our evolutionary past.

An important advantage of our new framework is that the examined key variables are not determined by ideological or cultural factors. As the relevant variables are revealed unconsciously in language, they also reach beyond strategically chosen words of escalation or de-escalation and are a more reliable predictor than explicit threats to violence. Presently, our research has relied on English language material but we would like to see replication efforts in other languages.

LANGUAGE CHANGES FAST ON THE INTERNET – HOW DOES THIS APPROACH KEEP UP?

Today, entire think tanks and research institutions are dedicated to studying online subcultures, encompassing their communication and linguistic specificities. For example, today's extreme right has built its own lexicon of hate speech and uses a range of subculture references, memes and insider jokes. Our approach is to look at psychological patterns (specifically, identity fusion) that are largely independent of these language changes in online subcultures. However, our vocabulary lists used for the natural language processing should also be updated to reflect emerging subculture terms used to express threats to the in-group, to dehumanise or demonise the enemy, or to condone violence.

WHAT ABOUT ACCESS TO HIDDEN OR PRIVATE FORUMS – DOES MORE NEED TO BE DONE TO OPEN THESE UP TO RESEARCH?

Limited access to data is one of the biggest challenges for developing rigorous models that can trace patterns in pathways to violence. Technology companies should make their datasets available to academic researchers. This is not only true for hidden fringe forums and private chats in end-to-end encrypted messaging apps but even for the more public platforms. For example, Twitter (now X) has made it much harder under Elon Musk's leadership to legally gather and analyse its data.

HAVE THERE BEEN ANY REAL WORLD APPLICATIONS OF THIS APPROACH – WHERE WOULD YOU EXPECT TO SEE THEM FIRST?

The intelligence community and big tech firms have expressed interest in the approach and started to reconsider their approaches to violence risk assessments in online environments. We presented the findings of the research project to over 200 employees of the German domestic intelligence agency, Bundesamt für Verfassungsschutz, at the Cologne and Berlin headquarters and gave briefings to YouTube's executives and policy teams at the firm's headquarters in San Bruno, California. We have also advised a range of intelligence and security agencies, governmental units and tech firms in Europe and North America based on the research. Some of them have taken steps to integrate the new socio-psychological framework into their workstreams.

DOES AI OFFER AN OPPORTUNITY TO EXTEND YOUR WORK – HOW?

AI offers many opportunities for our work. One next step could be to integrate the violence risk assessment model with AI tools that can further refine the linguistic markers and test them for different areas for application. Today, AI-based predictive policing is primarily used for geographic hot-spot mapping and spatial risk calculations. But risk assessments of individual offenders have seen significant growth in recent years. Any use of AI tools will need to be complemented with manual reviews and should carefully consider ethical challenges. For example, human bias can be replicated and even amplified by AI-supported predictive policing.

WHAT CHALLENGES DID YOU RUN INTO IN BUILDING YOUR FRAMEWORK – TECHNICAL OR OTHER?

The project was marked by challenges related to data availability and access conditions for the gathering of violent and non-violent extremist group datasets. The selection of online groups we used to test our framework on is not a representative sample that reflects the entire far-right extremism landscape in cyberspace. It is rather a convenience sample of virtual groups from across the violence spectrum that were suitable for the purpose of this analysis. Moreover, the data collection for this research project was challenging due to the widely differing architectures of the online platforms that needed to be scraped to obtain the relevant datasets. Instead of using a self-written Python scrip for each platform, we therefore made use of a commercial web scraping service.

WHAT ARE THE LIMITATIONS OF THIS APPROACH IN PREDICTING VIOLENT BEHAVIOUR?

The new violence risk assessment framework carries inevitable limitations in its design. While the framework was developed based on previous evidence concerning psychological and linguistic violence predictors found in offline settings, as well as a comparative language-based analysis of manifestos of authors with varying levels of real-world violence records, it was subsequently applied to the analysis of content from online groups across the violence spectrum. However, neither offline group dynamics nor the process of manifesto writing can be fully equated with the message exchanges in online groups. There are clear differences in the communication modes, as well as the timeframe and intentionality of the texts produced by manifesto authors as opposed to members of online groups.

Another notable limitation stems from the highly contextual nature of online messages. To address this limitation, we carried out manual reviews to remove false positives from our NLP analysis results. These reviews were informed by the coding framework, which was previously tested in an ICR analysis with the help of two expert coders and 24 non-expert coders. However, the messages in the manual sample reviews were often ambiguous and subject to interpretation. For example, "plague" could be read as either demonisation or dehumanisation, depending on the context. The sentence "I am fighting for what I believe is right, not dreaming of some goofy revolution" could be interpreted as a physical or a metaphorical fight. We sought to address these challenges in the additional qualitative assessment that explored the nature and context of messages in more depth.

CAN THIS APPROACH BE USED TO ANALYSE CONTENT IN OTHER FORMATS, FOR EXAMPLE VIDEO OR AUDIO?

It would be possible to create a coding framework for images or audio messages to trace proxies for the variables in our framework (i.e. identity fusion, existential threat, dehumanisation, demonisation or violence condoning norms). We haven't actually done this yet so it would need some discussion with the team but we would likely begin by simply transcribing verbal content in audio or video formats and code the content in much the same way as we did for written materials (e.g., manifestos). Automating such processes is something we would consider later. As computational analytics for visual/audio formats is not yet as sophisticated as text-based natural language programming, there might be additional challenges.

WHAT IS THE NEXT STAGE / EVOLUTION IN THIS RESEARCH TOPIC?

We would welcome efforts from other researchers to attempt to replicate and build on our findings. We are also seeking closer collaboration with the policy community to develop more sophisticated diagnostic tools and early interventions/ preventative measures. Our next project will use the framework to investigate the risk that despotic heads of state resort to extreme forms of violence, for example in the form of genocides or wars of aggression, at high risk to self. We will start by analysing the communication materials of historical leaders who have been convicted as war criminals for carrying out violent atrocities against their own populations or other country's populations, before moving on to contemporary leaders to assess their risk of using extreme violence.

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