ESOMAR QUESTIONNAIRE FOR COMPANIES ON RESEARCH ACTIVITY FOR 2020

Note: Some companies may have several means of revenue, such as work conducted by non-research companies or where the research function has no identifiable business or profit centre. Where possible, please include **ONLY** research-related turnover, commissioned either by clients inside your country or clients based in other countries.

QUESTIONNAIRE

Respondent's details

Q1 Please, select your country
[Drop-down menu]

Q1a This is the local currency selected for your country. Please, make sure that all your estimates are calculated in this currency:
[Preselected]

Size and characteristics of the industry

Q2 Your company may provide one or several types of research and reporting services, as well as other types of unrelated services. We would like to know the total turnover generated ONLY by your data gathering, processing and reporting services during 2020 and 2019 (as reference), commissioned either by clients inside your country or clients based in other countries.
[Fill in turnover for 2019 and for 2020]

Q2a Was your firm profitable on that revenue in 2020?
[Single choice: Yes / No / I don't know, I prefer not to disclose]

Q2b As compared to 2020, how difficult will it be for you to be profitable in 2021?
[Single choice: Much harder / A little harder / About the same / A little easier / Much easier / I don't know]

Q3 To understand where the turnover in 2020 was generated. What share of your turnover corresponds to either fieldwork, analysis or reporting being carried out totally or partially in your home country?
[Fill in percentages or totals for 2019 and for 2020]

Q3a How much of your international turnover corresponded to fieldwork, analysis or reporting subcontracted to other companies abroad?
If "DK", we will assume a level of internationally subcontracted services of 0.
[Skip if Q3 is DK or 'Abroad' is 0. Answers cannot be higher than the turnover generated abroad estimated in Q3]
[Fill in percentages or totals for 2019 and for 2020]

Given the international nature of the Global Market Research study, we will only consider your total domestic turnover, that is, your total turnover minus the fieldwork subcontracted abroad.

Domestic turnover of your company in 2020: *Automatically calculated*

FOR REFERENCE

Q3b Thinking of the top three countries where you conducted research in the past year (outside of your own), approximately what percentage of your turnover is accounted for by each?
Example 1: "I only have information on one country". Please fill in the estimate for that country, and leave the rest blank.
[Skip if Q3 is DK or 'Abroad' is 0]
[Select the top-three countries and their shares in percentages. The remaining amount corresponds to the rest of the world]

Q4 And how much of the turnover generated in your country in 2020 belongs to larger, multi-country studies? This will help us determine, by subtraction, the level of purely domestic research.
Larger, multi-country studies: research projects with fieldwork conducted with research participants in at least one country besides your own.
[Answers cannot be higher than the turnover generated in the home country, estimated in Q3]
[Fill in percentages or totals]

Q5 What type of client commissioned your projects in 2020?
Given the complexity and scope of certain projects, we define as **"domestic client"** those invoices paid from your home country, and **"international"** to those paid from a different country.
[Fill in percentages or totals]

Q6 If there was any pro-bono research conducted in the country, how much would have been its value?
Pro-bono: research which is provided free, without charge for instance, for NGO's or charities
[Fill in totals]

Q7 What was the total number of employees related to the market research industry in your company in 2020 and what was their approximate specialisation?
[Fill in full numbers for: total number of i) full time employees and ii) part-time and freelancers. For each of these two groups, please specify how many are market researchers, data analysts and consultants]

Q7a How do you anticipate your total number of full-time employees will change in 2021, as compared to 2020? Please, select one.
[Single choice: Increase / Remain / Decrease / I don't know]

Q8 What is the forecast of your company for the upcoming year 2021, discounting the effects of inflation?
[Single choice: Grow by (fill in percentage) / No change / Decline by (fill in percentage) / I don't know / I prefer not to disclose]

Q8a In 2020, a significant part of the workforce had to work from home. How many employees do you expect will continue to work from home in 2021, compared to 2020?
[Single choice: Many more / A few more / About the same number will continue to work from home in 2021 compared to 2020 / Fewer / Much fewer / I don't know]

Q8b **In the long term,** what do you consider to be the greatest threat to the future or market research firms like your own?
[Single choice: Data mining / Speed of decision making / Increasing costs / Declining budgets / DIY tools]

FOR REFERENCE

The last 4 questions ask about the breakdowns of your activity

We would really appreciate it if you filled these estimates in, to understand better the industry in your country. However, you can skip the question if you do not have enough information.

Q9 What was the split of your domestic turnover between Quantitative, Qualitative research, and Analysis and Reporting in 2020? If the share of turnover for Reporting is unknown, we will assume 0%.

[Fill in percentages for:
- Quantitative research: Telephone CATI, F2F (PAPI / CAPI), Online quantitative research, Mobile / smartphone quantitative research, Audience measurement, Online / Web analytics, Automated digital / electronic, Social media monitoring
- Qualitative research: F2F Group discussions / Focus groups, In-depth F2F interviews, Online qual, Mobile qual, Traditional ethnography, Online research communities
- Other uncategorised activity
- Subtotal for data gathering (automatically calculated or to be filled in if the previous categories are left empty)
- Reporting: Consulting firm research, Advisory services, Marketing reports/research and all other Secondary (desk) Research]

Quantitative methods: Objective measurements and the statistical, mathematical, or numerical analysis of data collected through polls, questionnaires, and surveys, or by manipulating pre-existing statistical data using computational techniques. Quantitative research focuses on gathering numerical data and generalizing it across groups of people or to explain a particular phenomenon.
Qualitative methods: Research with stress on the socially constructed nature of reality, the intimate relationship between the researcher and what is studied, and the situational constraints that shape inquiry. Such researchers emphasize the value-laden nature of inquiry. They seek answers to questions that stress how social experience is created and given meaning.
Reporting: Step that usually follows data gathering, where it is firstly checked, then analysed (the reason why secondary analysis also falls within this step in the process) and is then presented to the client. Presentation forms can comprise presentations, workshops, dedicated reports, counselling on business processes, advisory services, etc.

Q9a Could you provide the breakdown of your domestic turnover per type of research method?

[Fill in percentages for:
- Telephone CATI (including CATI to mobiles, i.e. a person-to-person interview)
- Face-to-face (PAPI / CAPI)
- Online quantitative research (including CASI – "self-interviewing" – and online panel)
- Mobile / Smartphone quantitative research
- Audience measurement
- Online / Web analytics (includes content tracking, digital tracking, CRM analytics and all advanced analytics)
- Automated digital / electronic (includes interactive voice recorded interviews, location-based services, passive metering and log file processing)
- Social media monitoring
- Other quantitative methods for data gathering
- F2F Group discussions / Focus groups
- In-depth face to face interviews
- Online Qual (online groups, discussions, bulletin boards)
- Mobile Qual (mobile ethno., mobile diaries, photo boards)
- Traditional Ethnography
- Online research communities (includes social media, in-depth interviews & online ethno.) & social media listening
- Other qualitative methods for data gathering]

FOR REFERENCE

Telephone CATI: CATI is a telephone surveying technique in which the interviewer follows a script provided by a software application. IVR stands for "Interactive Voice Recording" interviews, an automated technology which allows interaction with a human being (caller) with the help of voice input and dial input
Face-to-face: PAPI, paper and pencil interview. CAPI, computer-assisted personal interviewing
Online quantitative research: CASI is a technique for survey data collection in which the respondent uses a computer to complete the survey questionnaire without an interviewer administering it to the respondent.
Mobile / smartphone quantitative research: Respondents reached via cell phone to participate in studies and/or participate in mobile phone surveys when connected to the Internet on their mobile device
Audience measurement measures how many people are in an audience, usually in relation to radio listenership and television viewership, but also in relation to newspaper and magazine readership.
Online and web analytics is the measurement, collection, analysis and reporting of web data for purposes of understanding and optimizing web and navigation usage and carry out market research.
Social media monitoring: The process of identifying and determining what is being said about a brand, individual or product through different social and online channels.
Other: Includes many syndicated services for which breakdowns are not available. This option may also be used when a country does not provide detailed breakdowns for certain types of categories and is prompted to aggregate them under this label.
F2F Group Discussions / Focus Groups: People from similar backgrounds or experiences to discuss a specific topic of interest.
In-depth face to face interviews: Direct, one-on-one engagement with individual participants.
Online qual: Participants can conduct interviews or log onto an Online Research community over a period of time.
Mobile qual: Any type of research where moderators task and interact with respondents using mobiles or smartphones as the primary medium.
Traditional Ethnography: Understand the consumer in terms of cultural trends, lifestyle factors, attitudes and how social context influences product selection and usage.
An online community research is a community, deployed online, to carry out research using various market research methods. Social media listening is the process of collecting data from social platforms and forums on a chosen topic. This could be a brand, an industry, or anything at all.

Q9b Could you give a sense of the size of ResearchTech analysis in your company?
Note: ResearchTech: automated extraction of insights (data gathering and analysis) and data visualisation, whether it is from IoT (Internet of things) sources, online communities, online traffic, other quant/qual datasets etc.
[Fill in percentage for ResearchTech (automated extraction of insights)versus Other manual, statistical research]

Q10 What would be the breakdown of your domestic turnover per type of research project?
[Fill in percentages for:
- Market Measurement (Syndicated or custom retail/consumer panel/surveys for market size and share, including online)
- Market Modelling (Including marketing mix and media modelling)
- New Product/Service Development (Testing of concepts, products, services, packaging, pricing mix, etc. and volume forecasting)
- Advertising Pre-Testing (Copy)
- Advertising/Brand Tracking
- Media Audience/Research (Viewing, listening, readership, including online and social media measurement)
- Employee Satisfaction
- CRM Systems / Customer Satisfaction
- Mystery Shopping
- Omnibus/Shared Cost Surveys
- Usage & Attitude Studies (Including segmentation studies and motivational research)
- Opinion Research/Polling
- User Experience (Ux) research
- Non-profit Research
- Business-to-Business Studies not included above
- Other types of project]

FOR REFERENCE

Advertising Pre-Testing (Copy): A specialised discipline of market research that evaluates the effectiveness of an advertisement based on consumer responses, feedback, and behaviour.
Advertising/Brand Tracking: In-market research that monitors a brand's performance including brand and advertising awareness, product trial and usage, and attitudes about the brand versus their competition.
Employee Satisfaction: How satisfied or happy employees are with their jobs and their working environment.
CRM Systems / Customer Satisfaction: Helps an organization to get an accurate and sharp feedback on their performance and through different customer opinions helps them to understand what customers feel about them.
Omnibus/Shared Cost Surveys: Method of quantitative marketing research where data on a wide variety of subjects is collected during the same interview.
Opinion Research/Polling: Human research survey of public opinion from a particular sample.
User Experience (Ux) research: The systematic investigation of users and their requirements, in order to add context and insight into the process of designing the user experience.
Non-profit Research: The academic enterprise devoted to teaching and research on non-profit organizations and non-governmental organizations (NGOs), voluntary associations, voluntarism and voluntary action, philanthropy, civil society, and related activities.
Business-to-Business Studies not included above: Types of studies that focus on business-related customers and decision-makers.
Other: This option may be used when a country does not provide detailed breakdowns for certain types of categories and is prompted to aggregate them under this label.

Q11 What would be the breakdown of your domestic turnover per research design?

[Fill in percentages for:
- Ad hoc research
- Omnibus surveys
- Panel research (includes consumer panels, television audience measurement, retail audits and other continuous and non-continuous panel research)
- Other syndicated research
- Other continuous (at regular frequency, including radio listenership, online web tracking, brand, advertising and customer satisfaction trackers, and "retainer" contracts covering, e.g. 12 months of concept testing, innovation workshops, etc.)
- Discretionary design through self-serve platforms (depends on the user's needs)
- Other types of research designs]

Ad hoc research: Specifically designed to address a particular problem or issue
Omnibus surveys: A method of quantitative marketing research where data on a wide variety of subjects is collected during the same interview.
Panel research: A method for collecting data repeatedly, from a pre-recruited set of people.
Other syndicated research: A research study which is conducted and funded by a market research firm but not for any specific client.
Other continuous: Undertaken to provide regular, ongoing data, information, and insights as opposed to ad hoc studies that are more project oriented and carried out at specific times for specific reasons.
Discretionary designs through self-serve platforms: Research conducted through self-serve platforms (formerly known as DIY) that can take any form depending on the needs of the user and can therefore **not** be allocated in any of the previous categories, but that contributes to the industry's turnover for the country.
Other types of research: This option may be used when a country does not provide detailed breakdowns for certain types of categories and is prompted to aggregate them under this label.

FOR REFERENCE

Q12 Lastly, what types of client made up your domestic turnover for 2020?

[Fill in percentages for:
- Manufacturing (consumer non-durables)
- Manufacturing (consumer durables)
- Manufacturing (pharmaceutical)
- Manufacturing (automotive)
- Utilities - Electricity, gas, water, postal services
- Wholesale and retail trade
- Information and communication (advertising)
- Information and communication (telecommunications and ICT)
- Information and communication (media and broadcasting)
- Financial and insurance activities
- Public administration
- Non-profit and NGO's, international organisations (World Bank, UN)
- Education - Research institutes
- Tourism, travel and recreation
- Other types of clients]

Manufacturing (consumer non-durables): Food, beverages and confectionery, tobacco products, OCT medicines, cosmetics and hygiene and Other consumer non-durables: textiles, wearing apparel, leather and related products, wood and of products of wood and cork except furniture, paper and paper products, printing and reproduction of recorded media, coke and refined petroleum products, rubber and plastics products.
Manufacturing (consumer durables): Basic metals, fabricated metal products except machinery and equipment, computer, electronic and optical products, electrical equipment, machinery and equipment, furniture, repair and installation of machinery and equipment, other non-metallic mineral products and other manufacturing.
Manufacturing (pharmaceutical): Pharmaceuticals, medicinal chemical and botanical products
Manufacturing (automotive): Motor vehicles, trailers and semi-trailers and other transport equipment
Utilities - Electricity, gas, water, postal services: Whether public or privately owned
Wholesale and retail trade: Including oil
Information and communication (advertising): Publishing activities
Information and communication (telecommunications and ICT): Programming and broadcasting activities, telecommunications, computer programming, consultancy and related activities and information service activities.
Information and communication (media and broadcasting): Motion picture, video and television programme production, sound recording and music publishing activities.
Financial and insurance activities: Financial service activities, except insurance and pension funding, insurance, reinsurance and pension funding, except compulsory social security and activities auxiliary to financial service and insurance activities.
Non-profit and NGO's, international organisations (World Bank, UN): Includes international organisations such as the World Bank and the UN.
Education - Research institutes: that may include foundations or universities, as well as dedicated advisory, economic or specialist institutes that are (usually) endowed for doing research.
Public administration and defence; compulsory social security
Tourism, travel and recreation: Cultural activities, gambling and betting activities and sports activities, amusement and recreation activities.
Other: Accommodation and food service activities, real estate activities, professional, scientific and technical activities, administrative and support service activities, transportation and storage, construction, water supply; sewerage, waste management and remediation activities, agriculture, forestry and fishing and mining and quarrying. This option may also be used when a country does not provide detailed breakdowns for certain types of categories and is prompted to aggregate them under this label.

Q12a Please, provide below a breakdown for Manufacturing (consumer non-durables)

[Fill in percentages for:
- Food, beverages and confectionery
- OCT medicines, cosmetics and hygiene
- Tobacco and cigarettes
- Other consumer non-durables]

FOR REFERENCE