
■ THE UK RESEARCH INDUSTRY LEAGUE TABLES

The Top 100 and consolidated ownership tables are the most comprehensive guide to the largest players in the UK market. The UK Research Industry League Tables are published annually in *Research* and updated frequently on research-live.com.

Scope

- The tables record turnover by UK-based organisations regardless of the location of their ultimate ownership or of their clients.
- The tables include companies engaged in the collection, processing, analysis and interpretation of information about markets and social issues. The diversity of the companies reflects the diversity of the industry.
- The table excludes companies that are wholly dedicated to data collection, panels and fieldwork.
- Even those companies whose origins lie in conventional survey research (the 'traditional' market research industry) are remarkably different from one another. Many years ago the industry embraced extension into a huge variety of qualitative (i.e. non-survey) techniques. Now there is widespread acceptance of the essential added value of advisory and consulting skills as part of the core mix of skills and services offered to clients.
- Definition of the industry boundaries is therefore more blurred than before, and certainly more than some traditionalists would prefer. Just as few professionals in any sector can any longer work effectively in single-discipline silos, so too the services of agencies are broadening and diversifying, as are the backgrounds and experience of people employed in agencies.
- Client demand for insight and intelligence certainly now draws on many sources of information. It is notable how many organisations with origins in traditional survey research now position and describe themselves more broadly as market information groups.
- The pace of change will continue to accelerate. Remember Darwin's outlook on evolution. "it is not the strongest of the species that survives, nor the most intelligent that survives. It is the one that is the most adaptable to change."

Why publish industry league tables?

Compilation and publication of industry league tables are undertaken to identify the largest suppliers in the sector, and to contribute data towards assessment of the total size of the industry. The tables also convey the shape of the industry, and place businesses alongside one another in a wider industry context. They offer some indication of market share, and at least elementary benchmarking of comparative growth.

League tables are primarily statements of scale of operation. Many industries are characterised by a cluster of large organisations at the top and a long tail of small and medium-sized enterprises. The research sector is no exception.

Large-scale organisations with multinational/global presence are essential for supporting clients who demand certain capabilities from their suppliers. Consolidation in the last decade has created a small number of such organisations. However, many of these have struggled to achieve either significant or consistent growth, or indeed to gain market share within the mature UK market. That gain has tended to be derived from relatively fast-growing developing markets elsewhere in the world.

Furthermore, league tables which rank turnover are not statements of either performance or profitability. Beyond the 'lifestyle companies', there are many excellent research agencies which deliberately restrict or limit size as they see personal attention as part of their offering to clients. It should also be remembered that there are many successful and reputable enterprises whose turnover is below the threshold for inclusion in the Top 100. It remains a huge advantage of the UK industry that it continues to generate start-ups and new entrants, some of whom have very high growth rates from a modest base and constitute compelling business development case studies.

The advent of online research is already bridging some of the international capability gap between large and small providers.

How the tables were compiled

Many information sources have been used, including the financial and business press and related websites.

- Companies House has been the principal source of comparative data in the public domain but reporting dates vary within the year. Most are December but a few are as early as February and March.
- Annual reports of public companies, and their websites, continue to vary between the financially informative and the ingeniously opaque.
- Private companies have in many cases supplied their turnover data directly to us, particularly if they file only modified accounts at Companies House. In a few cases, these are 'round numbers' rather than precise figures.
- For a small number of companies turnover has been estimated, based on known turnover ranges in the *Research Buyer's Guide* and other information.
- Many participants in the MRS Annual Survey of the industry agreed to the publication of their turnover.
- Some groups of companies publish the revenues of their divisions and subsidiaries; others publish only consolidated financial data. This table contains both consolidated and individual company turnover data. The table is therefore not always comparing like with like in the ranking. This is addressed by re-ranking them in the Consolidated Ownership Table. Following acquisition, some well-known brands disappear each year from the table.
- Both tables seek to identify the volume of business derived from a UK base, including international projects. Although a few inconsistencies remain, the tables are important components in estimating the overall size of the UK market for market research, as they represent the majority of the industry's turnover.

Table 1

The UK Research Industry League Table: Top 100

The largest suppliers of market research, analysis and intelligence, ranked by individual company UK-based turnover (£m) reported in 2009

Last updated: 1 December 2010

	2009	2008	2007	£m
1 TNS Research International	170.000*	N/A	N/A	
2 Ipsos MORI	128.446	128.109	115.409	
3 Dunnhumby	122.332	79.721	55.186	
4 Millward Brown	107.040	115.015	113.583	
5 GfK NOP	87.841	95.400	93.624	
6 AC Nielsen	82.000*	83.432	70.563	
7 Gartner	81.747	93.012	88.380	
8 Synovate	73.892	71.845	65.361	
9 IMS Health Group	61.500*	61.296	65.147	
10 Datamonitor	55.352	51.117	45.796	
11 Cello Research & Consultancy	52.143	52.935	40.063	
12 Mintel International Group	50.216	45.593	43.753	

*Estimated

	2009	2008	2007
13 Kantar Media	48.636	N/A	N/A
14 NatCen	41.075	35.950	31.257
15 Euromonitor	34.533	29.777	25.890
16 IRI Infoscan	31.000*	32.999	33.451
17 Frost & Sullivan	N/A	23.335	19.067
18 GfK Retail & Technology	23.354	22.922	20.295
19 Hall & Partners	20.490	21.200	18.500
20 Harris Interactive	20.277	21.913	22.583
21 ICM Research Group	18.766	17.789	17.464
22 IDC	18.453	18.687	18.561
23 Ebiquity	18.419	17.220	16.100
24 Adelphi International Research	17.048	15.733	16.734
25 BDRC Continental	15.118	15.699	15.375
26 Hay Group Insight	15.000*	N/A	N/A
27 mmr Group	14.317	12.284	12.528
28 ORC International	13.796	13.793	13.680
29 Flamingo	12.876	11.726	9.465
30 The Research Partnership	12.401	9.514	8.236
31 Double Helix Development	12.222	9.590	8.450
32 You Gov	10.763	12.574	7.900
33 AGB Nielsen Media Research	N/A	10.615	9.333
34 Gallup Organisation	10.244	10.727	9.400
35 Experian Footfall	10.224	10.305	9.388
36 Nunwood Group	10.016	9.318	8.585
37 Illuminas	9.641	9.955	12.141
38 BMG Research	9.138	8.458	9.022
39 Forrester Research	N/A	9.038	7.986
40 Maritz Research	8.699	8.790	7.927
41 GfK Kynetec	8.488	6.910	N/A
42 Added Value	8.429	10.493	11.752
43 Lorien Customer Focus	8.182	9.250	12.469
44 PWC International Survey Unit	8.000*	N/A	N/A

*Estimated

	2009	2008	2007
45 BASES	7.800*	N/A	N/A
46 Marketing Sciences	7.759	8.846	7.787
47 ESA	7.652	8.546	8.053
48 Business Research Group	7.061	6.747	4.802
49 IFF Research	6.998	6.987	5.511
50 The Futures Company	6.751	7.059	6.834
51 Holden Pearmain Research	6.741	7.408	7.500
52 HPI Research	6.703	9.185	10.018
53 Retail Eyes	6.670	6.104	4.658
54 CSW Research	6.442	4.612	8.481
55 Grass Roots Group	6.170	5.026	4.858
56 SPA	6.110	6.947	6.755
57 FDS	6.102	7.325	6.050
58 Conquest Research	6.085	6.226	6.182
59 The Leadership Factor	5.800	5.000	4.300
60 Jigsaw Research	5.738	4.957	3.929
61 Incite Marketing Planning	5.656	3.257	3.275
62 Brainjuicer	5.525	5.627	4.209
63 Network Research & Marketing	5.367	5.372	4.058
64 Truth Marketing Strategies	5.290	4.015	0.688
65 Simpson Carpenter	5.210	6.726	7.202
66 Experian Hitwise	5.202	3.209	4.447
67 MARKIT Economics	5.000*	N/A	N/A
68 Optimisa Research	4.921	5.385	6.315
69 Incomes Data Services	4.913	5.713	6.897
70 R L Polk	4.708	5.463	5.634
71 Oxford Research Agency	4.707	5.309	N/A
72 RDSi	4.705	4.675	N/A
73 Quadrangle	4.596	4.562	3.591
74 RSMB Television Research	4.320	4.321	3.223
75 Opinion Leader Research	4.307	6.926	9.375
76 Promar International	4.245	3.872	3.805

*Estimated

	2009	2008	2007
77 Kadence UK	4.202	3.890	2.808
78 Brand Health International	4.068	4.390	3.914
79 National Readership Surveys	4.044	4.008	3.788
80 Arnold & Bolingbroke	4.000*	N/A	N/A
81 Firefish	3.951	4.389	3.869
82 Steer Davies Gleave	3.818*	3.692*	3.057*
83 ABA Market Research	3.800*	4.009	3.409
84 Echo Research	3.775*	3.776	3.775
85 Freshminds Research	3.760	3.780	3.340
86 Market Probe Europe	3.746	3.827	3.761
87 BPRI	3.700*	3.729	3.864
88 The Planning Shop International	3.638	4.110*	4.900
89 Accent	3.294	4.781	4.720
90 Csm Europe	3.250*	3.267	2.637
91 Northstar Research Partners	3.194	4.113	3.059
92 Maven Research	3.149	3.030	2.698
93 Virtual Surveys	3.124	3.380	2.620
94 Intrepid	3.100*	3.399	3.106
95 Swift Research	3.090	2.905	3.583
96 eDigital Research	3.054	2.505	1.666
97 JRA Research	2.914	2.745	2.576
98 Discovery Research	2.832	2.575	2.596
99 Aequus Research	2.817	3.150*	3.558
100 Millward Brown Ulster	2.809	3.259	3.149

*Estimated

Table 2

The Consolidated Ownership League Table

Largest businesses in UK-based market research, analysis, intelligence industry ranked by consolidated ownership

World	UK	Owner	Country	Turnover £m	Year	Operating companies
2	1	WPP plc	UK	415.000*	2009	Kantar Group – TNS Research International, Millward Brown, Kantar Media, BPRI, Added Value, The Futures Company, All Global, Lightspeed Research, Kantar Worldpanel
5	2	Ipsos Group SA	France	128.446	2009	Ipsos MORI
4	3	GfK SE	Germany	124.700	2009	GfK NOP, GfK Retail & Technology, GfK Animal Health, GfK Chart-Track, GfK IFR (UK), GfK Kynetec
13	4	Tesco plc	UK	122.332	2009	Dunnhumby
1	5	The Nielsen Company	USA	89.800*	2009	AC Nielsen, BASES, Netratings
–	6	Gartner Inc	USA	81.747	2009	Gartner UK
6	7	Aegis plc	UK	73.892	2009	Synovate
3	8	IMS Health Inc	USA	61.500*	2009	IMS Health Group (UK)
–	9	Informa plc	UK	55.352	2009	Datamonitor
23	10	Cello Group plc	UK	52.143	2009	Cello Research & Consultancy – RS Consulting, Consensus Research, Insight Research Group, Leapfrog Research & Planning, The Value Engineers (part), MR UK Research, 2CV
–	11	Mintel International Group	UK	50.216	2009	Mintel – private ownership
–	12	National Centre for Social Research	UK	41.075	2009	NatCen, registered charity, company limited by guarantee
–	13	Euromonitor plc	UK	34.533	2009	Euromonitor
–	14	Omnicom Inc	USA	33.366	2009	Hall & Partners, Flamingo
–	15	Information Resources Inc	USA	31.000*	2009	IRI Infoscán
–	16	Creston plc	UK	26.525	2009	ICM, Marketing Sciences, MSTs, CML
–	17	Frost & Sullivan Inc	USA	23.335	2008	Frost & Sullivan UK
15	18	Harris Interactive Inc	USA	20.277	2009	Harris Interactive

*Estimated

World	UK	Owner	Country	Turnover	Year	Operating companies
-	19	Experian Plc	UK	19.170	2009	Footfall, Hitwise, Catalyst, Future Foundation
-	20	International Data Corporation Inc	UK	18.453	2009	IDC UK
-	21	Ebiquity plc	UK	18.419	2009	Ebiquity Media & Marketing Analytics (formerly Thomson Intermedia)
-	22	Adelphi International Research	UK	17.048	2009	Private ownership
-	23	BDRC Continental	UK	15.118	2009	BDRC, Continental Research, Perspective
-	24	Hay Group plc	UK	15.000*	2009	Hay Group
-	25	mmr Group	UK	14.317	2009	Healthcare Research Worldwide, QUBIQ Online, MMR Food & Drink Research Worldwide
19	26	Info Group Inc	USA	13.796	2009	ORC International
-	27	Chime Communications plc	UK	10.800*	2009	Opinion Leader Research, Ledbury Research, Brand Democracy, Caucus, Naked Eye, Facts International
-	28	YouGov plc	UK	10.763	2009	YouGov
-	29	Gallup Inc	USA	10.244	2009	The Gallup Organisation
-	30	Media Square plc	UK	9.641	2009	Illuminas
-	31	Munro Global	UK	9.252	2009	Munro Global, FDS International, ACE, M-Lab, 3000ft, Maven Research

*Estimated