ESOMAR

Users & Buyers Global Insights Study 2020

The views of 640 users and buyers of insights and research, fieldwork September 2020.

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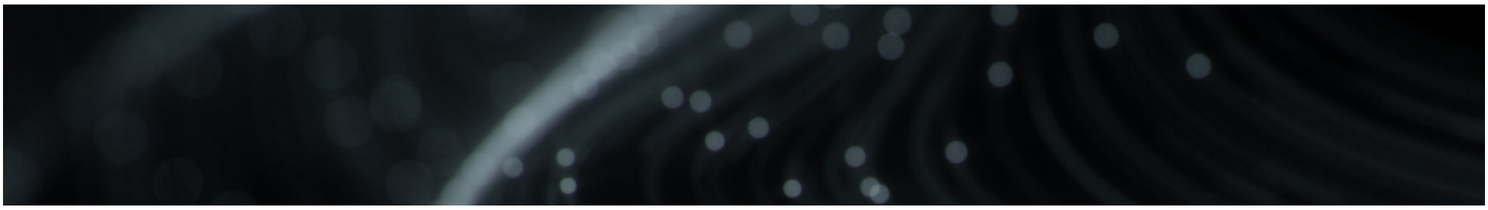


The Big Picture

There is a shift towards more research being conducted internally by the buyers and users of insights and we expect it to amount to 50% of all projects within a year or two. The main challenge clients and users are facing at the moment relates to resources and COVID-19. The key phrase is ‘doing more with less’. The key focus relates to conventional research in a data and regulation rich world where consumer behaviour appears to be changing quickly.

Foreword

The motto “the customer is always right” is a phrase pioneered by Harry Gordon Selfridge, John Wanamaker and Marshall Field in the early 1900’s. These men were successful retailers who learned early in their careers that the success of their stores depended on the happiness of their customers, and so the slogan has long been regarded as the cornerstone of customer-centricity.

More importantly, a happy customer continues to “buy”, and thus we must recognise that it is the customers who drive innovation, change and evolution, as otherwise they would move their spend and their budgets to other suppliers, or indeed, other sectors. This is as true for Insights and Analytics as it is for Financial Services, FMCG or Healthcare.

In a profession such as ours which has strong roots in science, rigour and ethics, the growing demand for speed, instant feedback, and digital solutions that we have witnessed in recent years, has often relegated a more fundamental understanding of how our clients work and business needs are changing to a secondary importance; instead, the emphasis has tended to be on the “now” and securing the budget available, not the “future” and how their needs may be evolving.

Recognising the fundamentally important role that brand-owners play in determining the shape and structure of our profession, this study – the first in what we hope will become an annual monitor – establishes a first benchmark of how insights are viewed and commissioned within brand-owning organisations, and the key criteria applied to what is considered “good” and “successful” research. As a result, we owe a huge debt of gratitude to all of our client-side friends who responded to this survey, as well as all the Partner organisations who supported us…..

Thank you to each and every one of you; we hope we can count on your support in 2021!

We sincerely hope you will enjoy the findings in this report, and that you may be able to benefit from some of the implications to ensure that your business remains at the leading edge of identifying and applying insights.

Finn Raben
Director General, ESOMAR

Partners:

This study is being conducted in partnership with ABEP (Brazil), ADM (Germany), AIM (Chile), AIMRO (Ireland), AMAI (Mexico), ANISE (Nigeria), ARF (US), ASBPM (Brazil), CEISMU (Uruguay), CRIC (Canada), Confirmit, IA (US), JMRA (Japan), MOA (Netherlands), MRSS (Singapore), NewMR, PUMa (Germany), Potentiate (Australia), QRCA (US), QUIRKS (US), RANZ (New Zealand), SAARF (South Africa), SAIMO (Argentina), The Research Society (Australia), and the Vietnam Market Research Association.

Executive Summary

Here are the views of 640 buyers and users of research from around the world, expressing their views, concerns and intentions in terms of insights.

The Big Picture

There is a shift towards more research being conducted internally by the buyers and users of insights which is expected to amount to 50% of all projects within a year or two. The main challenge clients and users are facing at the moment relates to resource and COVID-19. The key phrase is ‘doing more with less’. The key focus relates to how best to leverage conventional research in a data and regulation rich world, where consumer behaviour appears to be changing quickly.

Projects are shifting to internal

Clients and users of insights told us that about 40% of their research projects are being conducted internally, with a wide variation from 0% to 100%. Further, nearly 50% said the internal share is increasing. This leads us to forecast that within a year or two 50% of research will be conducted internally.

COVID-19 and the Recession are currently the key challenges

Cuts in budget, shortages of resources, changes in consumer behaviour, and the need to conduct more research are currently the key drivers (behind the increase in projects being conducted internally). Whilst there are plenty of exceptions, this is the focus for most buyers and users of insights.

The near future is about core research, not the cutting edge

In addition to dealing with resource and COVID related issues, our participants had a number of other topics that they saw as key for 2021 and the next few years. For example, compliance and competence with data rules and ethics, the ability to measure changes in consumer behaviour, and the ability to be able to provide fast, easy to assimilate links to wider processes, are all going to be important. The main consequence seems to be a shift away from the cutting edge (e.g. chatbots) towards simple research done efficiently (and ethically).

Key Priority for Buyers/Users

The key point is to be able to service the business needs, not necessarily to build a bigger insights team. The flow of projects from external partners to internal should also be a democratisation flow from insight teams to the rest of the organisation. The process of bringing research internal should reflect the key strengths of agencies and internal teams, which differs by company, vertical, and region.

Key Priority for Suppliers

The key opportunities for suppliers appear to lie in two areas. Firstly, the area of facilitating the growth of internal research. Creating platforms and services that enable internal teams to deal with a growing range of projects, safely and easily. Secondly, providing services that can't easily be provided in-house. For example, by focusing on benchmarking, comparisons, technical skills, and one-off projects. However, even in those areas where external providers have key skills, there is a need to focus more on the end of the process, delivering results and presentations that result in action.

The Shift to Internal

Clients and users of insights told us that about 40% of their research projects are being conducted internally, with a wide variation from 0% to 100% (chart 1).

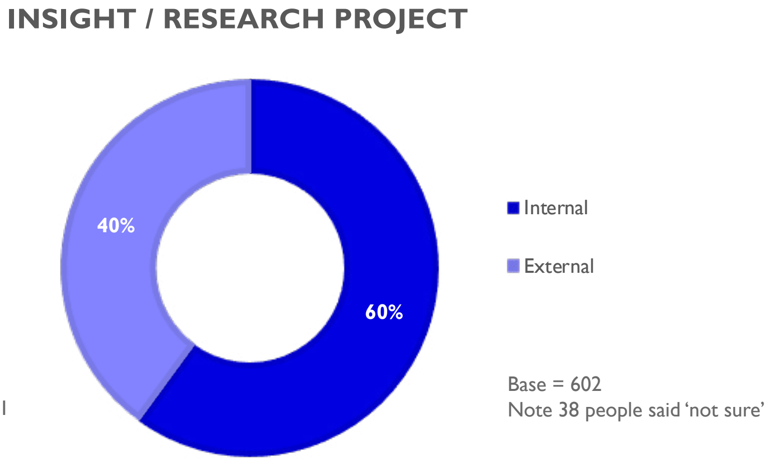


Chart 1

The findings were broadly consistent across regions and by types of company. In Japan (72%), Ireland (66%) and among CPG/FMCG companies (71%) the external share was larger. The internal share was larger in Australia (52%).

Nearly 50% said the internal share is increasing (chart 2). This leads us to suggest that within a year or two 50% of research will be conducted internally.

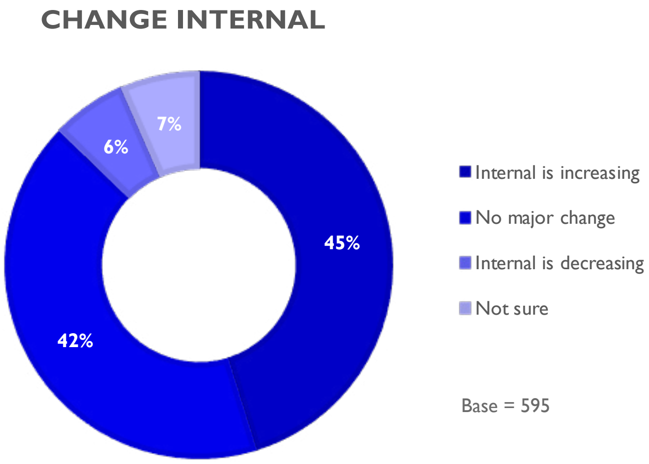


Chart 2

The percentage reporting an increase in the share of projects being done internally was broadly similar across regions and types. The lowest shares for internal were in Japan (32%), Media & Broadcast organisations (33%), and those with fewer than 1000 Employees (34%). The highest values were from Financial Services (53%) and CPG/FMCG (52%).

Buyers and users of research described to us the type of projects they associated with internal partners and external partners – with the option to say they would use both. Chart 3 shows that internal is preferred for both tactical and strategic projects, while external partners are preferred for comparisons, assessments and (interestingly), business recommendations.

BALANCE OF USE FOR INTERNAL AND EXTERNAL PARTNERS

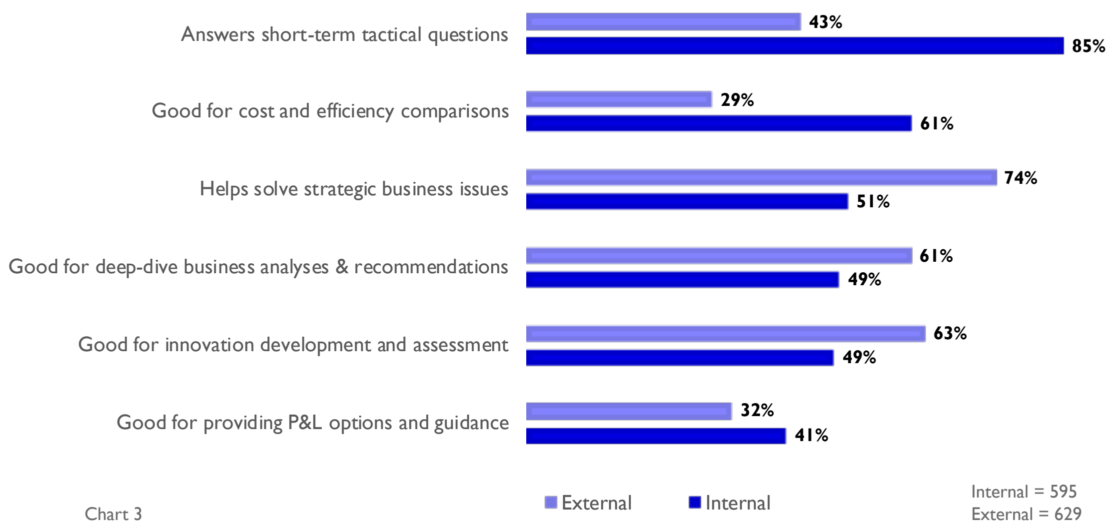


Chart 3

These patterns are broadly similar across regions and types of company. However, this similarity by region should not lead to the assumption that the same pattern is happening in every organisation. There are some organisations with no internal research, there are some organisations who run internal projects, but where the share is declining, and there are organisations who think external partners are more appropriate than internal partners for both strategic and tactical questions.

The key message is that the trend is towards internal and that the key strengths of external partners tend to be in areas where comparisons, independence, benchmarking or complexity are key.

COVID-19 and the Recession are the key current challenges

Cuts in budget, shortages of resources, changes in consumer behaviour, and the need to conduct more research are currently the key drivers for moving more research internally. While there are plenty of exceptions, this is the focus for most buyers and users of insights.

The research participants were asked to tell us about their 2020 and 2021 budgets, the results are shown in Chart 4.

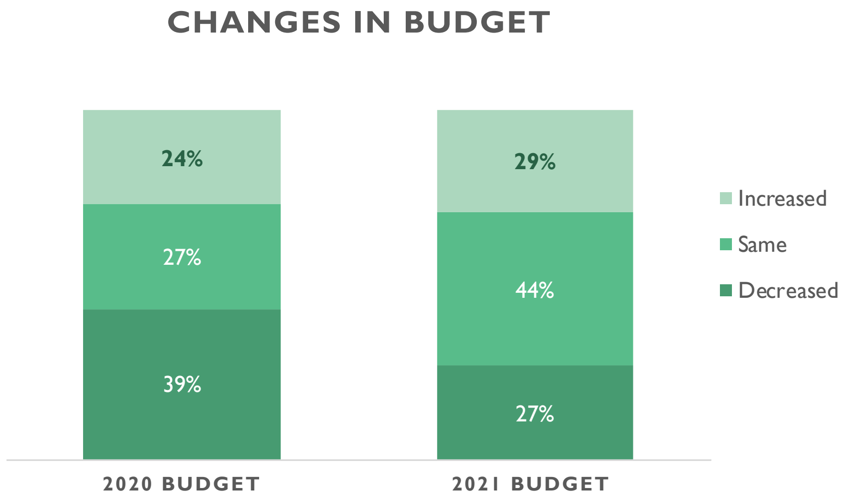


Chart 4 Base = 640

From other data, for example the ESOMAR Global Market Research Report, we have seen that spending on research in 2020 is expected to fall by about 20% to 25%, globally. This study indicates that close to 40% of companies have reduced their spend in 2020. However, the data is a useful reminder that COVID-19 and the economic shock have not hit all sectors and companies equally and about a quarter of companies have increased their spending this year and nearly a third of clients expect to increase it next year.
The cuts in 2020 budgets are particularly deep in Latin America and for CPG/FMCG companies, and much less severe for the Tech and Telecommunications sector. The 29% who say they are expecting an increased budget in 2021 say that only 37% of this increase is planned to be spent on external providers.

Although the amount of resources for many organisations has fallen in 2020, and will decline for others in 2021, nearly 60% say they expect to be conducting more projects in 2021, as shown in Chart 5.

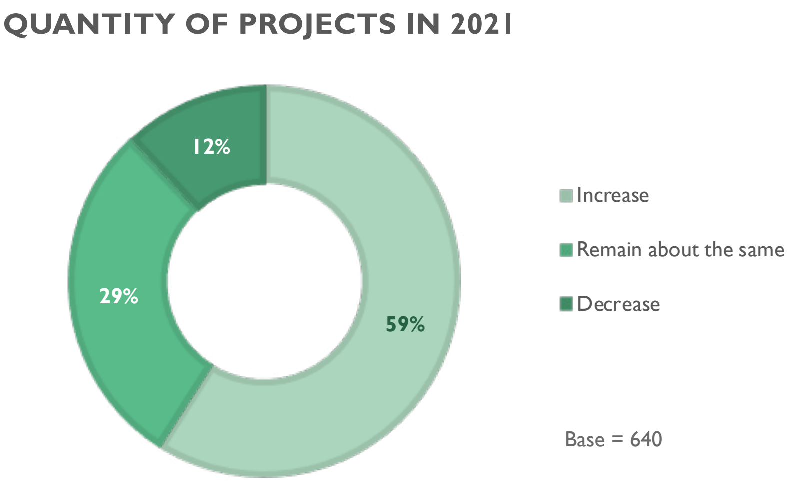


Chart 5

Base = 640

Again, the patterns were largely similar across the sample. Companies in Financial Services (70%) and from Australia (72%) reported even higher expectations for increases in the number of projects in 2021, while Japan (38%) reported a lower figure.

We asked our 640 users and buyers of insights to describe, in their own words, the main challenges they are facing at the moment. The two key issues that were mentioned were resources and COVID-19. Examples of the 2020 challenges were *"Impact of Covid on business Cost/Spend reduction programs Internal re-organizations*" and "*COVID is limiting our ability to meet face-to-face with business partners and respondents.*"

The near future is about core research, not the cutting edge

In addition to dealing with resource and COVID related issues, our participants had a number of other topics that they saw as key for 2021 and the next few years. For example, compliance and competence with data rules and ethics, the ability to measure changes in consumer behaviour, and the ability to be able to provide fast, easy to assimilate links to wider processes, are all going to be important. The main consequence seems to be a shift away from the cutting edge (e.g. chatbots) towards simpler research done efficiently (and ethically).

We asked the 640 users and buyers of research to describe in their own words the key challenges they expect to be dealing with in 2021. As well as the issues being faced in 2020, a number of topics emerged. Key themes included changing consumer habits, linking insights to business outcomes, the need to make better use of data, and the balance between internal and external. Examples of the comments relating to these themes were:

- *"balancing 'internal' vs 'external' + digital hype"*
- *"retaining agility to measure and respond to ongoing changes in consumer sentiment and behaviour, triggered by health, economic and social issues"*
- *"Prioritizing work, dealing with research sponsors using DIY tools if we won't help them"*
- *"Increased demand for cost-efficient internal research with less time to deliver deeper analysis and insights to stakeholders. Need to integrate data from other sources to generate unified insights across primary research and digital analytics."*

We asked participants to evaluate a range of topics and to assess them in terms of importance to their organisation. The results are shown in Chart 6.

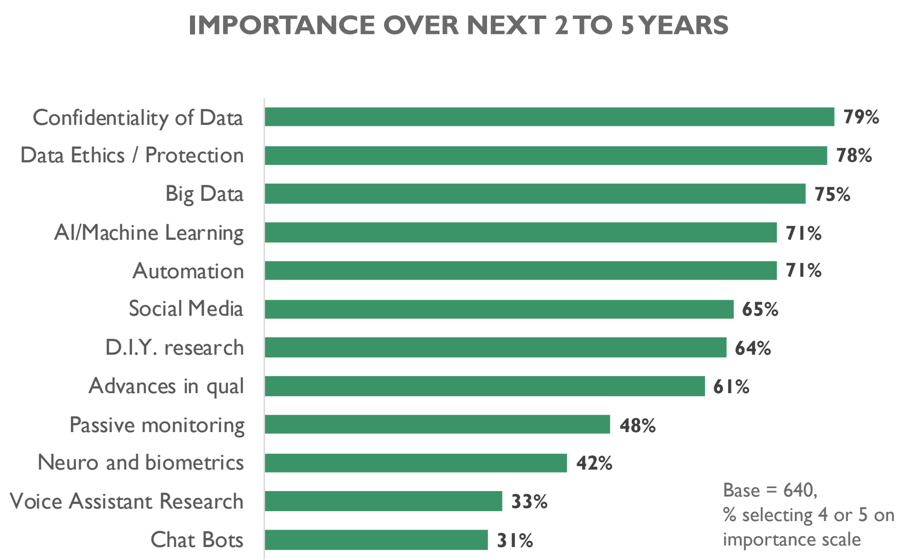


Chart 6

The two big messages from this chart are:

1. The areas that most companies rate as important relate to data, firstly ethics, secondly the mechanics of large data flows.
2. Far fewer companies are focused on the ‘shiny new toys’, for example chat bots, neuro, and passive monitoring.

However, this does not mean that there is no interest in topics such as chatbots and biometrics, 30% to 40% of participants said they were important. The message is that the trend is towards simpler research performed efficiently, with a major role for internal departments. There are also some groups by region and vertical who have slightly different priorities. For example, Media and Broadcasting (63%) see passive monitoring as more important than others and Japan sees advances in qual as being more important

To help guide external partners over the next year and beyond we asked our 640 buyers and users of insights to evaluate their external partners on five key scales, shown in Chart 7.

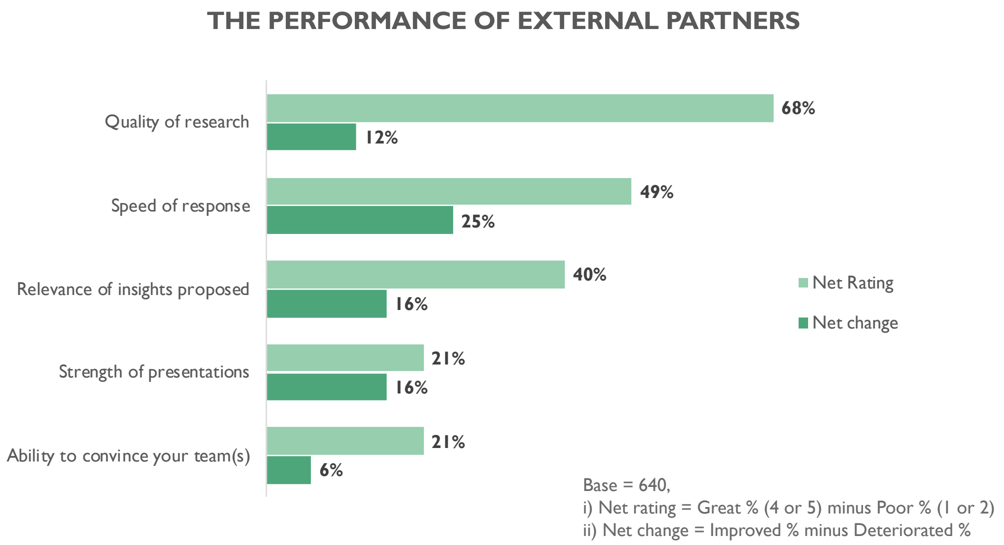


Chart 7

Chart 7 shows that Quality of Research (based on 71% saying 4 or 5, and 3% saying 1 or 2) is not a key problem. We also asked participants to rate internal partners in terms of quality and the scores were very similar to the scores for external partners.

The Speed of Response rating (based on rating a Good score from 61% and a Poor score of 12%) is also not a key worry, especially given the improvement score was 25% (the percentage who said Speed was Improving, 35%, minus the percentage saying Deteriorating, 10%).

The key problems for external partners and the challenge for them over the next few years is to address the quality of presentations and the ability for their work and resultant messaging to convince stakeholders. The perceptions of external partners were weakest in the APAC region and were best in Latin America.

Summary and Recommendations

We would like to start the summary by extending our thanks to all of the partners who helped make this project possible and the 640 users and buyers of research who gave up their time to share their experiences and views.

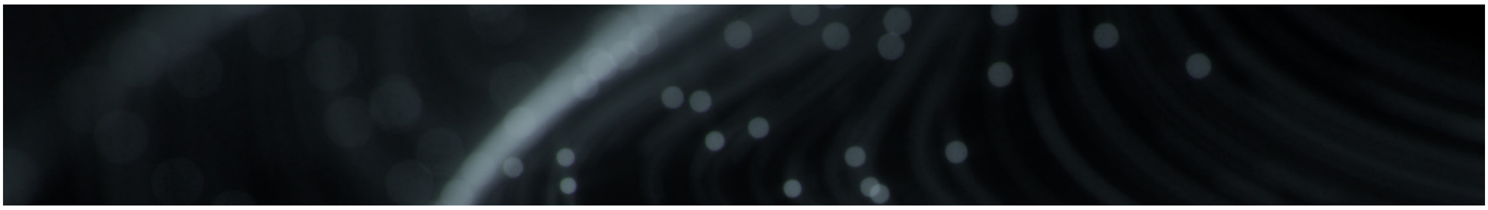
The Executive Summary and the three brief sections above highlight the key findings from the study and below we set out our recommendations for both the users and suppliers of insights. We have not reported on every question in the study, nor every sub-group. You are invited to explore the data tables in the appendix to draw further conclusions.

Recommendation to Buyers/Users

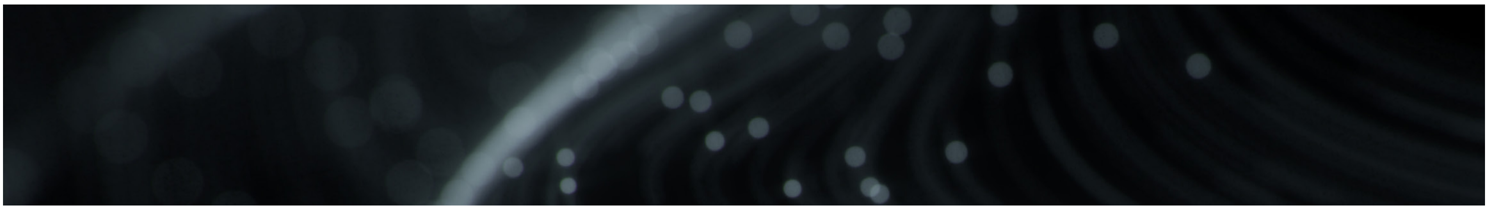
The key point is to be able to service the business needs, not necessarily to build a bigger insights team. The flow of projects from external partners to internal should also be a democratisation flow from insight teams to the rest of the organisation. The process of bringing research internal should reflect the key strengths of agencies and internal teams, which differs by company, vertical, and region.

Recommendation to Suppliers

The key opportunities for suppliers appear to lie in two areas. Firstly, the area of facilitating the growth of internal research. Creating platforms and services that enable internal teams to deal with a growing range of projects, safely and easily. Secondly, providing services that can't easily be provided in-house. For example, by focusing on benchmarking, comparisons, technical skills, and one-off projects. However, even in those areas where external providers have key skills, there is a need to focus more on the end of the process, delivering results and presentations that result in action.
Finally, and with reference to the last chart shown, it is perhaps also worth reiterating the view that – as one client said – "*the project does not end with the results presentation, it starts with that presentation*"; the key point here being that it is only once the client gets to see the results, that they can start to consider how to optimally implement the findings presented.



Appendix



Project Summary

The study was conducted with 640 buyers and users of insights during September 2020. The sample was sourced from more than 20 partners, shown below in alphabetical order.

ABEP (Brazil), ADM (Germany), AIM (Chile), AIMRO (Ireland), AMAI (Mexico), ANISE (Nigeria), ARF (US), ASBPM (Brazil), CEISMU (Uruguay), CRIC (Canada), Confirmit, IA (US), JMRA (Japan), MOA (Netherlands), MRSS (Singapore), NewMR, PUMa (Germany), Potentiate (Australia), QRCA (US), QUIRKS (US), RANZ (New Zealand), SAARF (South Africa), SAIMO (Argentina), The Research Society (Australia), and the Vietnam Market Research Association.

A copy of the questionnaire and key data tables is included in this report. The survey was scripted and hosted by Confirmit and was managed by Ray Poynter.

Countries

Responses were collected from 69 countries

Country	Count	Country	Count	Country	Count
United States	86	Philippines	6	Israel	2
Germany	62	Argentina	5	Luxembourg	2
United Kingdom	54	Austria	5	Poland	2
Ireland	38	Czech Republic	5	Serbia	2
Japan	37	Denmark	5	Taiwan	2
Australia	32	Portugal	5	Uruguay	2
Netherlands	28	United Arab Emirates	5	Venezuela	2
Canada	21	China (Hong Kong)	4	Algeria	1
India	19	Finland	4	Costa Rica	1
France	18	Peru	4	Estonia	1
Singapore	17	Saudi Arabia	4	Ghana	1
Switzerland	16	Croatia	3	Indonesia	1
Brazil	12	Greece	3	Iran	1
Romania	11	Malaysia	3	Kuwait	1
South Africa	11	Nigeria	3	Liechtenstein	1
Spain	11	Russia	3	Lithuania	1
Colombia	10	Sri Lanka	3	Malta	1
Mexico	9	Chile	2	Norway	1
Italy	8	China	2	Panama	1
Turkey	8	Dominican Republic	2	Puerto Rico	1
New Zealand	7	Egypt	2	Qatar	1
Sweden	7	Guatemala	2	Slovakia	1
Belgium	6	Hungary	2	Thailand	1

Countries with 30 or more responses are reported separately, all the data are reported by region.

Company Size	Count
More than 1000	430
200 to 1000	95
10 to 99	40
2 to 9	28
100 to 199	25
1, just me	18
Not sure	4
Total	640

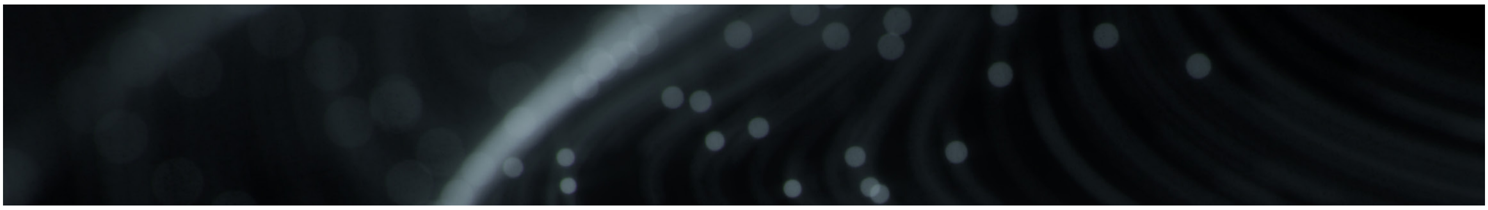
Size of Company

Almost 70% of the data came from companies with more than 1000 employees.

Industry Categorisation

26% of the sample came from the CPG/ FMCG vertical.

Vertical	Count
CPG / FMCG	164
Financial Services	83
Tech and Telecommunications	63
Media & Broadcasting	60
Retail	31
Consumer durables	26
Pharmaceutical	23
Tourism, Travel & Recreation	23
Government / NGO	22
Utilities	16
Automotive	14
Academia / Education	10
Other	105
Total	640



Questionnaire

Note, the survey was offered in four languages, English, French, Spanish and Japanese. The English language questionnaire is reported below. The median completion time was 9.6 minutes.

ESOMAR SURVEY AUG 2020

Language

Preferred Language / Langue préférée / Idioma preferido / 優先言語

- O **English (9)**
- O **Français (12)**
- O **Español (10)**
- O 日本語 (17)

Survey Introduction

Thank you for taking part in this study which aims to determine changes in the purchase and use of data and insights globally and provide a benchmark for future studies. The study is being organised and supported by the organisations listed below and its purpose is to share key metrics and trends about the insights process worldwide. Everybody who takes part in the study will get the option to receive a copy of the results from the partners.

Please know that this survey is being conducted in accordance with the ICC/ESOMAR Code.

The data you provide through this questionnaire will be kept anonymous and confidential, treated with the utmost care and will not be used for any other purpose.

By participating in this survey, we will place a cookie on your device, which is solely designed to avoid duplicate responses. If you don't agree with this, please close the browser.

For more information about how ESOMAR processes your personal data, please visit our privacy policy

This study is being conducted in partnership with ABEP (Brazil), ADM (Germany), AIM (Chile), AIMRO (Ireland), AMAI (Mexico), ANISE (Nigeria), ARF (US), ASBPM (Brazil), CEISMU (Uruguay), CRIC (Canada), Confirmit, IA (US), JMRA (Japan), MOA (Netherlands), MRSS (Singapore), NewMR, PUMa (Germany), Potentiate (Australia), QRCA (US), QUIRKS (US), RANZ (New Zealand), SAARF (South Africa), SAIMO (Argentina), The Research Society (Australia), and the Vietnam Market Research Association.

Repeat Screener

This survey is being delivered by several partners, so you may be invited more than once. Have you already completed this questionnaire?

- O Yes (1)
- O No (2)

Q1 Buyer

Which of the following best describes your organisation?

- O Brand and Buyer / user of insights/research (e.g. P&G, IKEA, HSBC, Toyota, Coca-Cola etc) (1)
- O Tech platform and Buyer / user of insights/research (e.g. Facebook, Amazon, Google etc) (2)
- O Business / Financial Consultant and Buyer / user of insights/research (e.g. Bain, PWC, McKinsey, etc) (3)
- O Media Advisor and Buyer / user of insights/research (e.g. McCann Worldwide, Dentsu, JWT, etc) (4)
- O Supplier of insights/research (e.g. Kantar, Nielsen, Ipsos, Intage, Macromill etc) (5)
- O Supplier of services to insights/research [Supply] (e.g. SPSS, Dynata, Cint etc) (6)
- O Other (please specify) (98)__________

STOP

Screened – Codes 5, 6, & 98

Thank you for your co-operation. This study is focusing only on research buyers/users. If you click on the link below, you will be re-directed to a page where you can sign-up to receive a copy of the report as soon as it is ready.

Click here to request a copy of the results

Q2 Internal vs External

Firstly, thinking of the past two years, approximately what proportion of insight/ research projects at your organisation are conducted internally, and what proportion are commissioned externally?

- O Internal (1) ________________________
- O External (2) ________________________
- O Not sure (1)

Q3 Change in Internal vs External

Is the proportion of insights/research done internally at your organisation increasing or decreasing?

- O Internal is increasing by % (1)__________
- O Internal is decreasing by % (2)__________
- O No major change (3)
- O Not sure (99)

Q4 Quality of Research

Thinking about the research you receive from ^returnText()^ partners, how would you generally rate the research on a 5-star scale, with 5 stars being Great and 1 star being Poor?

	1 - Poor (1)	2 (2)	3 (3)	4 (4)	5 - Great (5)	NA/Don't know (99)
Internal (1)	❍	❍	❍	❍	❍	❍
External (2)	❍	❍	❍	❍	❍	❍

Q4 Quality of Research

Thinking about the research you receive from ^returnText()^ partners, how would you generally rate the research on a 5-star scale, with 5 stars being Great and 1 star being Poor?

	Improved (7)	Declined (8)	About the same (9)	NA/Don't know (99)
Internal (1)	❍	❍	❍	❍
External (2)	❍	❍	❍	❍

Q6 Quality of features

Thinking about the research you receive from your partners, which of the following would you attribute to the work you receive?

	Internal	External
Answers short-term tactical questions (1)	❍	❍
Helps solve strategic business issues (2)	❍	❍
Good for cost and efficiency comparisons (3)	❍	❍
Good for innovation development and assessment (4)	❍	❍
Good for deep-dive business analyses & recommendations (5)	❍	❍
Good for providing P&L options and guidance (6)	❍	❍
Other (please specify) (98)_____________	❍	❍
None of the above (99)	❍	❍

Are there any business issues that you would NOT use your INTERNAL Partners for?

Q7a Quantity of work 2021

Thinking of your own workload, do you think that next year (2021), the quantity of projects you are involved in will increase or decrease?

- O Increase (1)
- O Decrease (2)
- O Remain about the same (3)

What do you see as the main reasons for this increase?

If Q7a Increase select

Q7b – Reason for increase?

Select all

- More primary data (e.g. quant surveys or qual projects) (1)
- More analysis of internal data (such as transactional, social or distribution data) (2)
- More analysis of third-party data (3)
- Other (specify) (98)__________
- Not sure (5)

Q8a Budget 2020 a

Compared with last year, have your company resources for research/insights increased or decreased?

- Increased (1)
- Decreased (2)
- Remained about the same (3)

Q8b Budget 2020 b

Looking ahead to 2021, do you think the resources for research/insights will increase, decrease, or remain the same?

- Increased (1)
- Decreased (2)
- Remained about the same (3)

Q9 Increase 2021

In increase selected at Q8a OR Q8b

In your opinion, is this increase linked to one of the following?

- The need for more external work (1)
- The need for more internal work (2)
- Not sure (3)
- Other (please specify) (98)__________

Q10a

Thinking more specifically about external research partners, how would you rate the agencies on the following attributes, using a 5-star scale, with 5 stars being Great and 1 star being Poor?More primary data (e.g. quant surveys or qual projects) (1)

	1 - Poor (1)	2 (2)	3 (3)	4 (4)	5 - Great (5)	NA/Don't know (99)
Speed of response (1)	❍	❍	❍	❍	❍	❍
Quality of research (2)	❍	❍	❍	❍	❍	❍
Strength of presentations (3)	❍	❍	❍	❍	❍	❍
Relevance of insights proposed (4)	❍	❍	❍	❍	❍	❍
Ability to convince your team(s) (5)	❍	❍	❍	❍	❍	❍

Q10b

And do you think that on these attributes, their standard is generally improving or deteriorating?

	Improving (1)	No change (2)	Deteriorating (3)	NA/Don't know (99)
Speed of response (1)	❍	❍	❍	❍
Quality of research (2)	❍	❍	❍	❍
Strength of presentations (3)	❍	❍	❍	❍
Relevance of insights proposed (4)	❍	❍	❍	❍
Ability to convince your team(s) (5)	❍	❍	❍	❍

Q11 Main challenges 2020

All things considered, what do you see as the main challenges you are facing at the moment?

Q12 Main challenges 2021

What do you think will be the main challenges you expect to be facing over the next 2-5 years?

Q13 Key trends

And lastly, looking at the key trends listed below, how important a role do you think they will play in the Insights Sector in the next 2-5 years?

5 stars being Very Important and 1 star being Not important at all

	1 - Not important at all (1)	2 (2)	3 (3)	4 (4)	5 - Very Important (5)	DK (99)
Automation (1)	❍	❍	❍	❍	❍	❍
Big data (2)	❍	❍	❍	❍	❍	❍
Chat Bots (3)	❍	❍	❍	❍	❍	❍
Confidentiality of Data (4)	❍	❍	❍	❍	❍	❍
D.I.Y. research (5)	❍	❍	❍	❍	❍	❍
Data Ethics / Protection (6)	❍	❍	❍	❍	❍	❍
Passive monitoring (7)	❍	❍	❍	❍	❍	❍
AI/Machine Learning (8)	❍	❍	❍	❍	❍	❍
Neuro and biometrics (9)	❍	❍	❍	❍	❍	❍
Advances in qual (10)	❍	❍	❍	❍	❍	❍
Voice Assistant Research (Siri, etc) (11)	❍	❍	❍	❍	❍	❍
Social Media (12)	❍	❍	❍	❍	❍	❍
Other (specify) (98)____________	❍	❍	❍	❍	❍	❍

CONDITION

true	false
Question ""	

QX Advances in Qual

In terms of Advances in qual, what sort of advances are you most interested in? Please tell is in your own words

Country

Which country are you based in?

- Abyssinia (1)
- Afghanistan (2)
- Albania (3)
- Algeria (4)
- Andorra (5)
- Angola (6)
- Anguilla (7)
- Antigua And Barbuda (8)
- Argentina (9)
- Armenia (10)
- Aruba (11)
- Australia (12)
- Austria (13)
- Azerbaijan (14)
- Bahamas (15)
- Bahrain (16)
- Bangladesh (17)
- Barbados (18)
- Belarus (19)
- Belgium (20)
- Belize (21)
- Benin (22)
- Bermuda (23)
- Bhutan (24)
- Bolivia (25)
- Bonaire, Sint Eustatius And Saba (26)
- Bosnia And Herzegovina (27)
- Botswana (28)
- Brazil (29)
- Brunei Darussalam (30)
- Bulgaria (31)
- Burkina Faso (32)
- Burundi (33)
- Cabo Verde (34)
- Cambodia (35)
- Cameroon (36)
- Canada (37)
- Cayman Islands (38)
- Central African Republic (39)
- Chad (40)
- Chile (41)
- China (42)
- China (Hong Kong) (43)
- China (Macao) (44)
- Colombia (45)
- Comoros (46)
- Congo (47)
- Cook Islands (48)
- Costa Rica (49)
- Côte D'Ivoire (50)
- Croatia (51)
- Cuba (52)
- Curaçao (53)
- Cyprus (54)
- Czech Republic (55)
- Dem. Rep. Congo (56)
- Denmark (57)
- Djibouti (58)
- Dominica (59)
- Dominican Republic (60)
- Ecuador (61)
- Egypt (62)
- El Salvador (63)
- Equatorial Guinea (64)

- Eritrea (65)
- Estonia (66)
- Ethiopia (67)
- Fiji (68)
- Finland (69)
- France (70)
- French Polynesia (71)
- Gabon (72)
- Gambia (73)
- Georgia (74)
- Germany (75)
- Ghana (76)
- Greece (77)
- Grenada (78)
- Guatemala (79)
- Guinea (80)
- Guinea-Bissau (81)
- Guyana (82)
- Haiti (83)
- Honduras (84)
- Hungary (85)
- Iceland (86)
- India (87)
- Indonesia (88)
- Iran (89)
- Iraq (90)
- Ireland (91)
- Israel (92)
- Italy (93)
- Jamaica (94)
- Japan (95)
- Jordan (96)
- Kazakhstan (97)
- Kenya (98)
- Kiribati (99)
- Kosovo (100)
- Kuwait (101)
- Kyrgyzstan (102)
- Laos (103)
- Latvia (104)
- Lebanon (105)
- Lesotho (106)
- Liberia (107)
- Libya (108)
- Liechtenstein (109)
- Lithuania (110)
- Luxembourg (111)
- Madagascar (112)
- Malawi (113)
- Malaysia (114)
- Maldives (115)
- Mali (116)
- Malta (117)
- Marshall Islands (118)
- Martinique (119)
- Mauritania (120)
- Mauritius (121)
- Mexico (122)
- Micronesia (123)
- Moldova (124)
- Monaco (125)
- Mongolia (126)
- Montenegro (127)
- Montserrat (128)
- Morocco (129)
- Mozambique (130)

- Myanmar (131)
- Namibia (132)
- Nauru (133)
- Nepal (134)
- Netherlands (135)
- New Caledonia (136)
- New Zealand (137)
- Nicaragua (138)
- Niger (139)
- Nigeria (140)
- Niue (141)
- North Korea (142)
- North Macedonia (143)
- Norway (144)
- Oman (145)
- Pakistan (146)
- Palau (147)
- Panama (148)
- Papua New Guinea (149)
- Paraguay (150)
- Peru (151)
- Philippines (152)
- Pitcairn (153)
- Poland (154)
- Portugal (155)
- Puerto Rico (156)
- Qatar (157)
- Réunion (158)
- Romania (159)
- Russia (160)
- Rwanda (161)
- Saint Barthélemy (162)
- Saint Helena, Ascension And Tristan Da Cunha (163)
- Saint Kitts And Nevis (164)
- Saint Lucia (165)
- Saint Martin (French Part) (166)
- Saint Pierre And Miquelon (167)
- Saint Vincent And The Grenadines (168)
- Samoa (169)
- San Marino (170)
- Sao Tome And Principe (171)
- Saudi Arabia (172)
- Senegal (173)
- Serbia (174)
- Seychelles (175)
- Sierra Leone (176)
- Singapore (177)
- Sint Maarten (Dutch Part) (178)
- Slovakia (179)
- Slovenia (180)
- Solomon Islands (181)
- Somalia (182)
- South Africa (183)
- South Korea (184)
- South Sudan (185)
- Spain (186)
- Sri Lanka (187)
- Sudan (188)
- Suriname (189)
- Swaziland (190)
- Sweden (191)
- Switzerland (192)
- Syria (193)
- Taiwan (194)
- Tajikistan (195)
- Tanzania (196)

- Thailand (197)
- Timor-Leste (198)
- Togo (199)
- Tonga (200)
- Trinidad And Tobago (201)
- Tunisia (202)
- Turkey (203)
- Turkmenistan (204)
- Tuvalu (205)
- Uganda (206)
- Ukraine (207)
- United Arab Emirates (208)
- United Kingdom (209)
- United States (210)
- Uruguay (211)
- Uzbekistan (212)
- Vanuatu (213)
- Venezuela (214)
- Vietnam (215)
- Western Sahara (216)
- Yemen (217)
- Zambia (218)
- Zimbabwe (219)

Size of company

How many people work in your entire organisation?

- 1, just me (1)
- 2 to 9 (2)
- 10 to 99 (3)
- 100 to 199 (4)
- 200 to 1000 (5)
- More than 1000 (6)
- Not sure (99)

Verticals

Which of the following best describes the business your company is in?

- O Academia / Education (1)
- O CPG / FMCG (2)
- O Pharmaceutical (3)
- O Media & Broadcasting (4)
- O Financial Services (5)
- O Consumer durables (6)
- O Tech and Telecommunications (7)
- O Retail (8)
- O Automotive (9)
- O Tourism, Travel & Recreation (10)
- O Utilities (11)
- O Government / NGO (12)
- O Other (Specify) (13)__________

Thank you for taking part in this project.

Anything Else?

Is there anything else you would like to tell us about this topic or this survey?

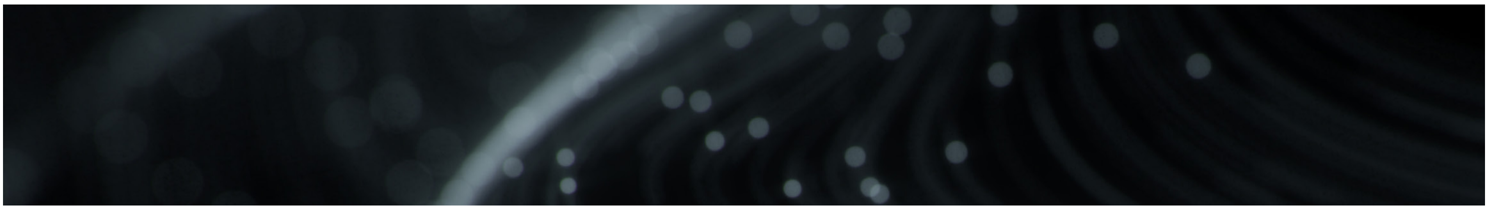
End note

If you would like a copy of the results, on the landing page after your survey has been submitted you will have the chance to enter your email address, which will be held separately from your data and only used to send you a copy of the final report.

STOP

Complete –

Click here to request a copy of the results



Data Tables

The data tables are available as a separate download link **here**

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