MSRA 2017 Annual Conference

Opening Introduction – MSRA Chair – Althea McCourt

Enhancing Market and Social Research in Africa
Agenda

• The Conference Theme
• The market research Industry Survey 2016
• The structure of the conference
• Our sponsors
GOOD MORNING, ladies & Gentlemen,
As the current Marketing Social and Research Association Chair 2017, I am delighted to welcome you all to our 16th Annual conference. I am particularly happy to note that amongst you all, we have both new and experienced researchers; clients and other industry stakeholders.

The conference traditionally also attracts regional participants, but our country’s dynamics this year has impacted on most things. We do however have one participant from Malawi (residing in Mozambique) Mr. Chisomo Chilemba, the Managing Director of Top Marketing LDA.

And thanks to you all, we have a good turn out and we intend to deliver a great conference to you all.
Our theme this year is titled **#UNDERSTANDING SHIFTING CONSUMER PRIORITIES** and aims to explore and examine what shifts are taking place from the consumers’ perspective.

Our Presenters will enlighten us on what the shifts are, what the main contributors to the shift are and finally how to ‘future proof’ our businesses and our clients brands to the changes.

*But before we look more closely at this, I would first like, to very briefly share with you some of the market research industry’s statistics, a few of which indicate the trending changes and direction of our industry*
Industry Survey 2016 (ESOMAR & MSRA Sources)

1. The Global Market

- Global market research turnover in 2016 stood at **US$44.5Bn**
  - Lead by North America **44%**
  - Followed by Europe – **36%**
  - Asia Pacific – **15%**
  - *(You can see that that doesn't leave much for the other parts of the world!)*
  - Latin America – **3%**
  - *Africa & the Middle East – 1% each*
Industry Survey 2016 (ESOMAR & MSRA Sources)

- **Africa** however was by far the fastest growing region at **22.7%** followed by Asia Pacific at **7.8%**.

- Growth in markets of Nigeria & Somalia by over 50% boosted overall growth on the continent.

- Whilst **Kenya’s net growth contracted** by **6%**. *(I guess that too can be attributed to early election fever)*
Industry Survey 2014-2016 Trends
(2. KENYA - MSRA Sources)

2.1 Sources of Turnover — *Domestic vs International clients*

- Revenues emanating from local companies, (Domestic clients) shifted from 73% of total revenues in 2014 to 66% in 2016. On the other hand, projects commissioned from outside of Kenya (international clients) have risen from 27% to 34%.

*What does this imply?*

- Increasing interest in our market from outside?
- Less interest or capacity in the domestic market?
- An Increase of multi country projects where Kenya is increasingly of interest?
2.2 Spend by Client Type — Market Sectors

• Whilst the vast bulk of research is conducted for FMCGs (Fast moving consumer goods) (70%), an interesting addition to research last year was research conducted in the agro-processing sector, accounting for 7% of research conducted.

• What does this imply?
  • That we are becoming more interested in understanding, refining and contributing domestically to the agricultural sector?

Research in beverages consistently leads the FMCG research.
Industry Survey 2014-2016 Trends (KENYA – MSRA)

• The client types further broken down also indicate an increasing amount of research being commissioned by the Telecommunications & financial services sectors

• Whilst there has been a contraction within the Media, Advertising and Research Institutes

What does this imply?
• Big data, data analytics being more readily generated and handled in house?
3. Spend by Research method & Research Design

- Quantitative research continues to account for over 75% of research conducted in terms of methodology, but **CAPI** (Computer Assisted Personal Interviewing) forms the bulk of the collection method practised. (76%).

- **Automated & digital data collection**, whilst only accounting for 6% in 2016, is a rise from 1% in 2014.

- Qualitative research has been stable accounting for around a quarter of research methodology, and constituting **21%** of research in 2016.
Industry Survey 2014-2016 Trends *(KENYA – MSRA)*

For the first time in 2016, **Data analytics and analysis** featured in Spend by research design, accounting for 2%. Ad hoc research however constitutes the bulk of research.
As you can see, The conference addresses the topic in three sessions:

1. Understanding the Shift in Consumer priorities
2. Responding to the shifting consumer priorities
3. Future proofing your business

We will have three moderators facilitating each of these sessions:

1. Susan Kahinga
2. Pauline Mwatu
3. Chris Karumba
Why this topic?

• Whilst we know that change is a constant in our lives, the world is changing at an ever increasing pace.
• The global dynamics of technology, politics, media and so on have an increasing impact on almost all parts of our lives.
• Africa has the additional dynamic of having a young population. According to African Development Bank, over 40% are below the age of 15 years and 20% are between the age of 15 – 24.
• They are our major drivers of change and users of technology
• Thus it's important for us to Stop and Take Stock, Evaluate, Acknowledge and indeed Understand who the consumers are, what they want and what are their priorities.

• We are looking to do this TODAY with YOU!
White Papers & Research Papers

Presentations will be made up of White papers & Research papers

**White papers are:**
- *Presentations that have been researched by a research firm or a client, and whose results or process has or can be shared with the public. It can also be a best practice document from a research agency or client.*

**Research papers are:**
- Presentations initiated and prepared by individual researchers in companies.
- They are seen as a good launching ground for our researchers to progress in the industry. *These will be judged by both a panel of judges as well as by you.*

We will close the afternoon by having a very lively and interactive **Expert Panel discussion** *(Are we ready for Change?)*
All of what we have in store is aimed to **Answer, Inform and Create Food for thought.**

And as you have seen from the program there are many presentations and all aim to keep your attention.
Finally, I take this opportunity to sincerely thank our Sponsors **Kantar** which in 2016 repositioned their brands TNS RMS and Millward Brown under **Kantar Insights** as Kantar TNS and Kantar Millward Brown.

And our first speaker to open the conference is the Kantar Insights EA CEO & COO for the WECA (West, East & Central Africa), **Soumya Saklani (Sumya)**

**WE ALSO HAVE WGS providing LIVE STREAMING and coverage – Sponsorship in Kind**

*Thank you & Welcome*

*Enjoy our 2017 MSRA Conference!*
Thank You!