



**“Africa, the New
Frontier?”**

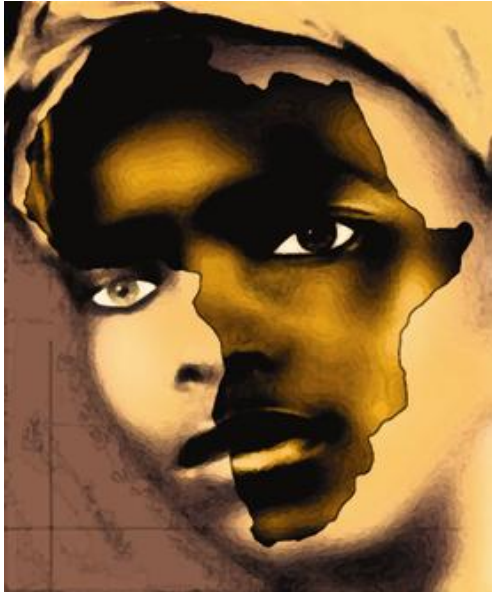
**3RD ANNUAL
MSRA
CONFERENCE**

**MARCH 25TH
2011**

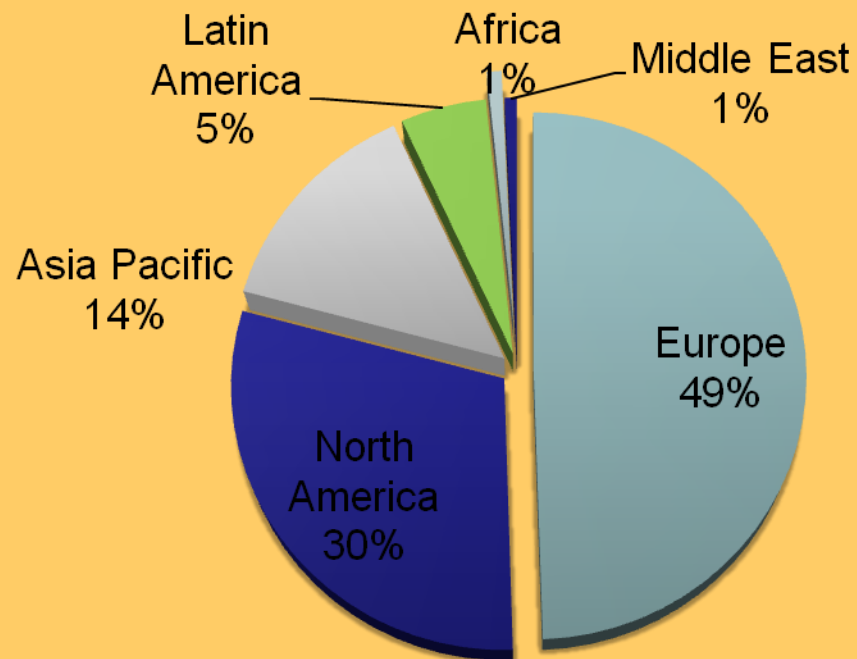


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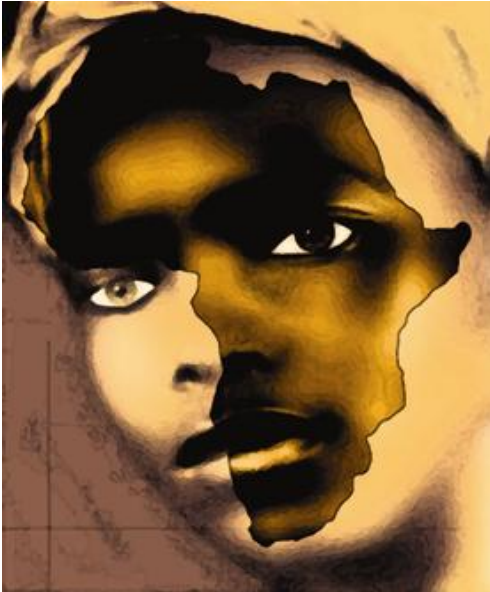
Global Research Market Industry



- Global research turnover – US\$ 32 Billion
- Africa contribute 1% of global research turnover
- Global average growth rate is 5% compared to Africa's 15%



Challenges facing Market Research in the EA & larger SSA region



Briefcase suppliers

Fatigued Respondents

Skills shortage/
Talent of executives
in the market place

Slow growth in
Appreciation of
Market
Research by the
SMEs

Training staff and
competitors
pouching them

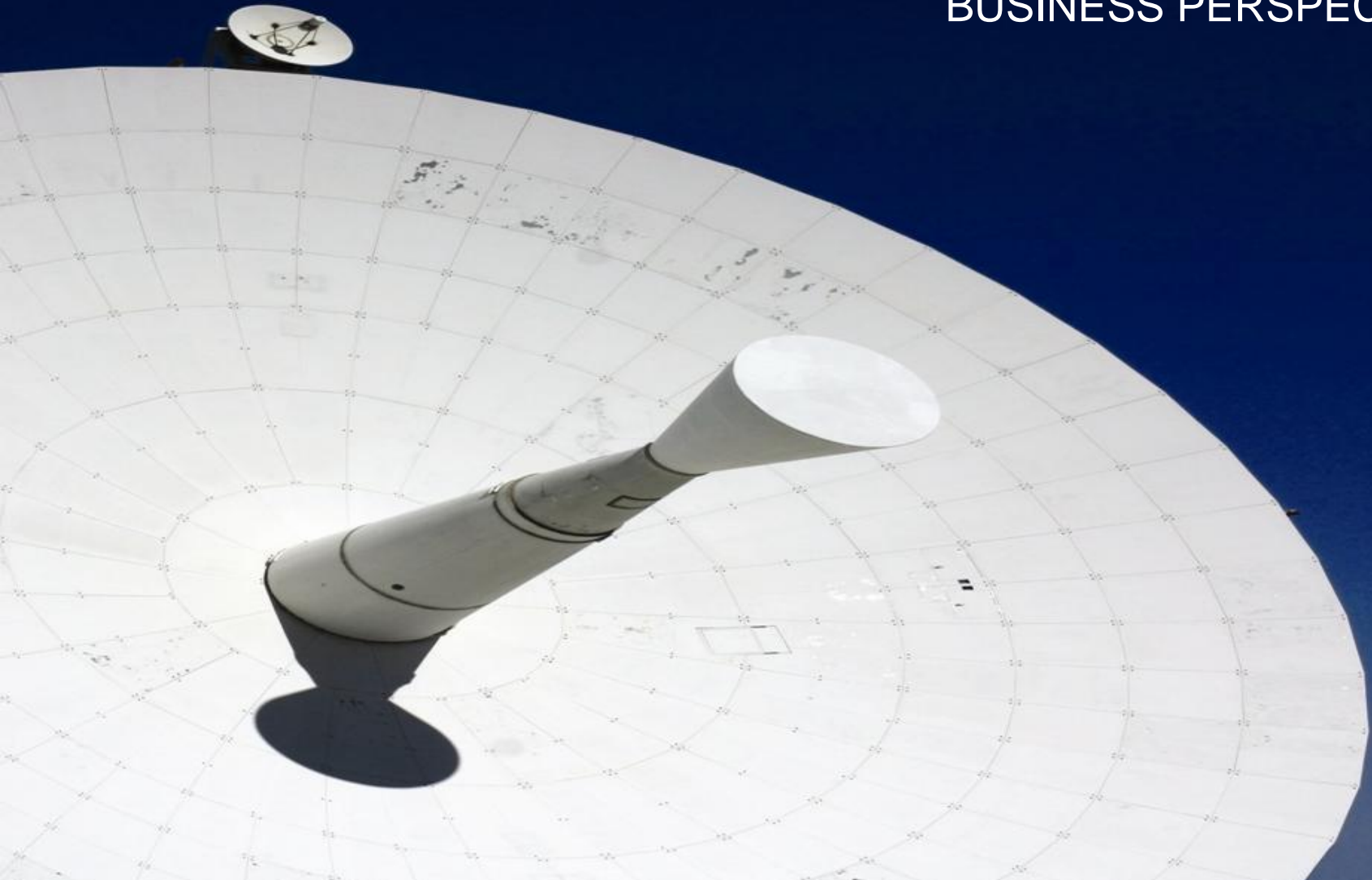
Cost (Withholding taxes
and high wages due to
labour intensive
fieldwork)

Limited
technologically
driven
methodology

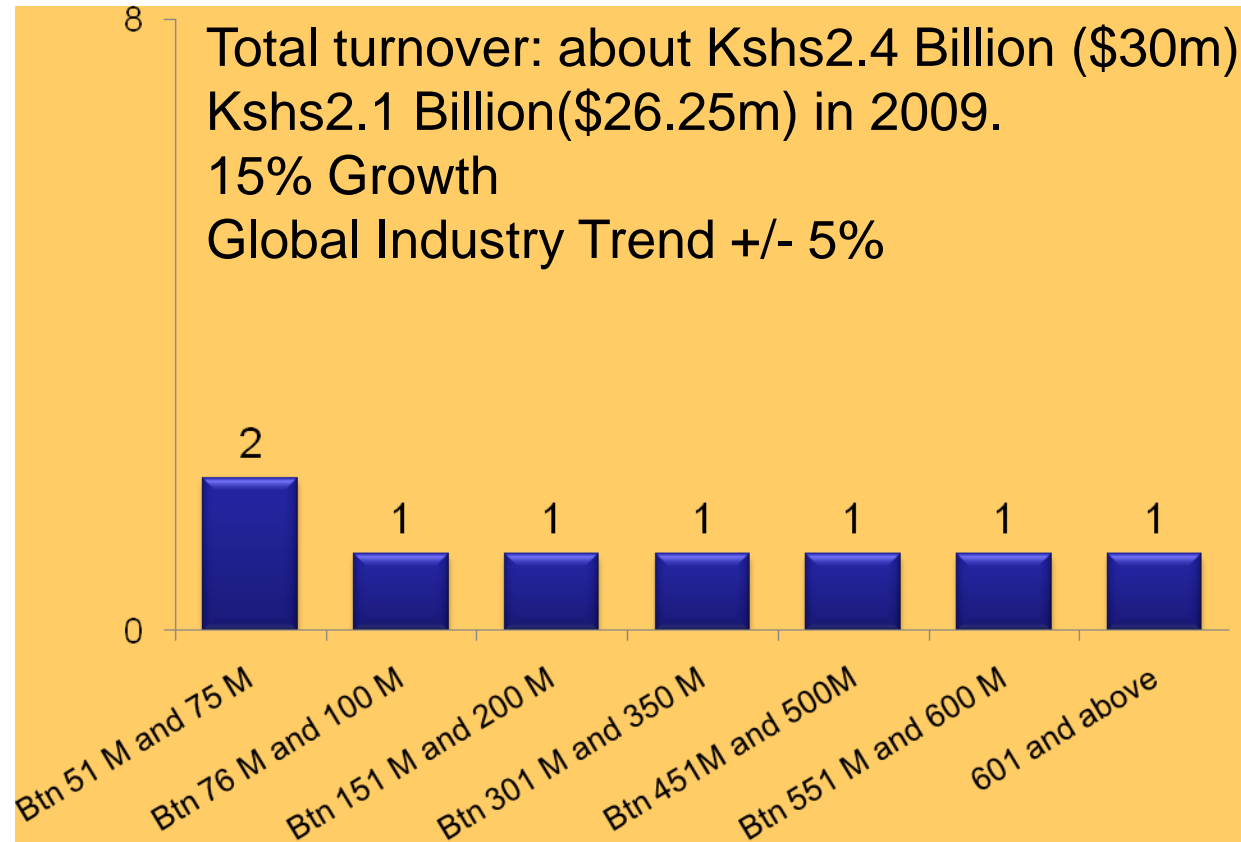
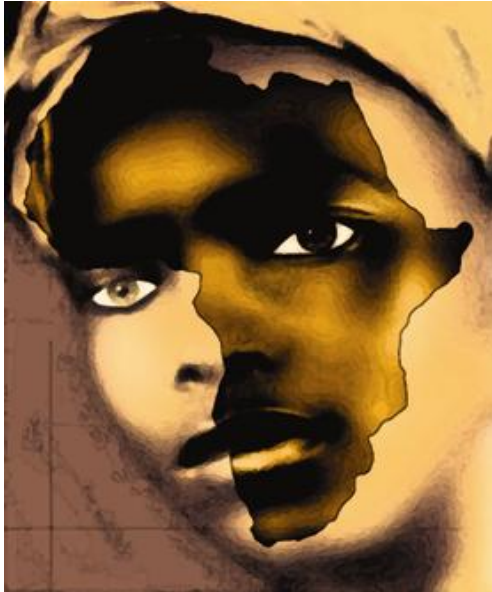
Shifting budgets to
West Africa

Base n=8 firms

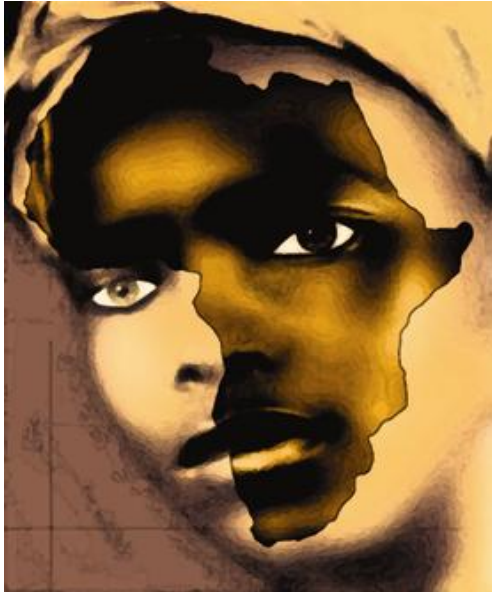
BUSINESS PERSPECTIVE



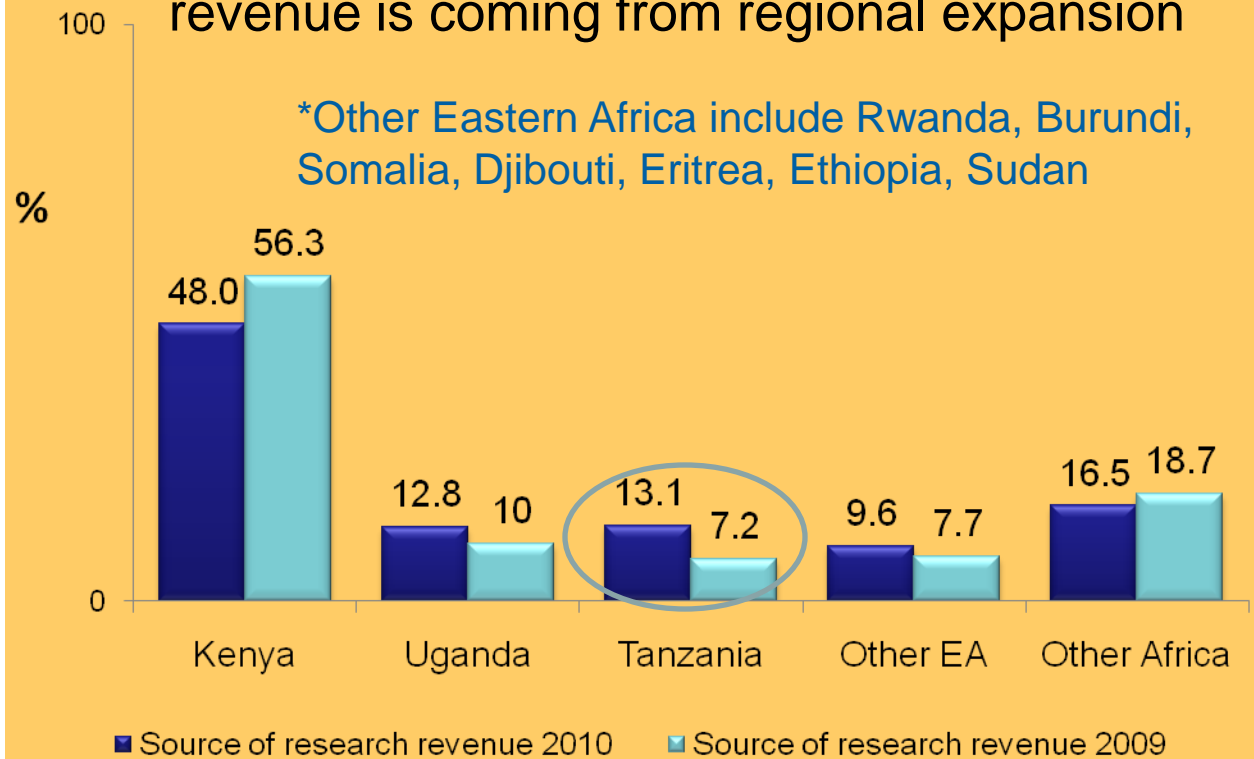
Gross annual turnover from market research (2010)



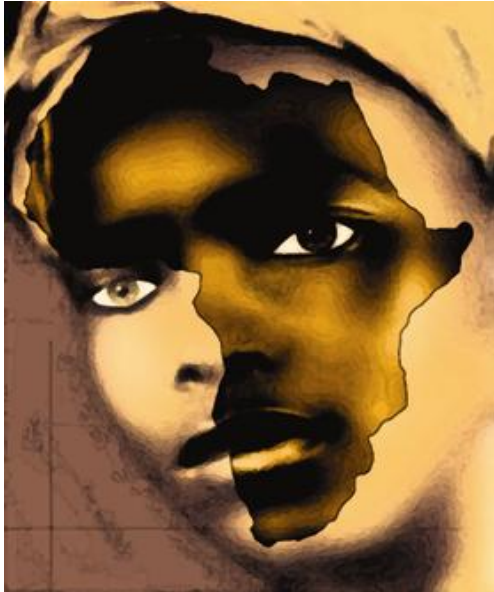
Countries contribution to research revenue



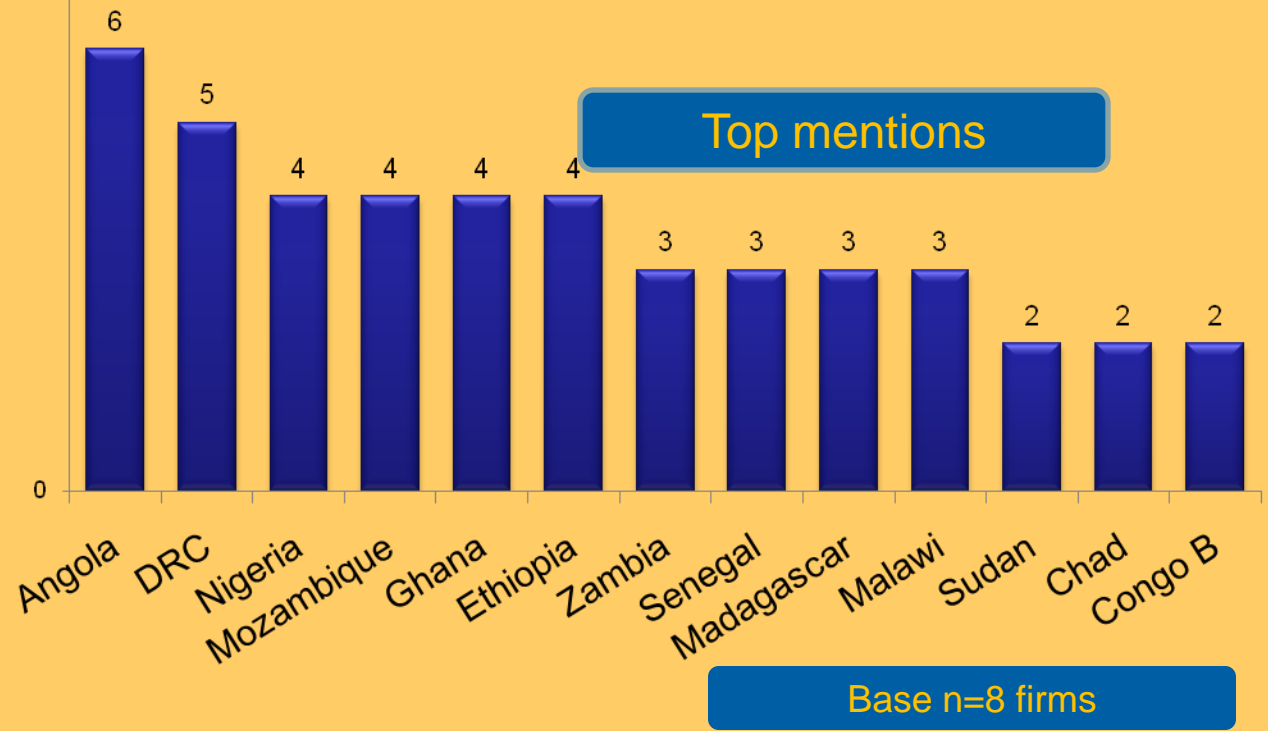
Compared to 2008 & 2009, more of research revenue is coming from regional expansion



Markets where research was conducted in 2010 other than East Africa



Firms moving into non-English speaking countries in Africa



Commissioning projects

A lot of business growth is coming from regional integration and from international clients who are interested in working in Africa

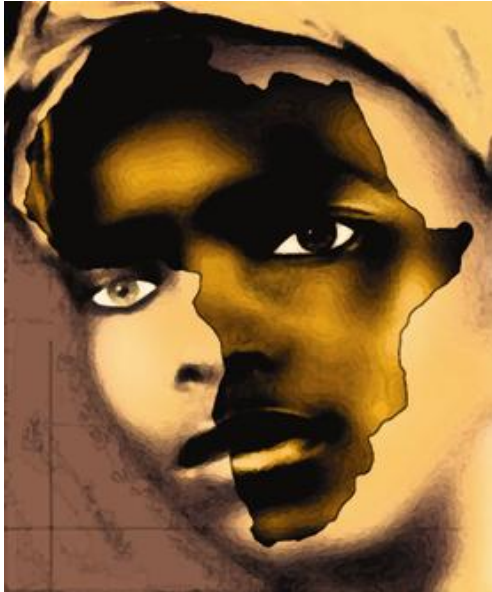
Commissioned by domestic clients within countries of research

- (2010) - 49%
- (2009) - 57%

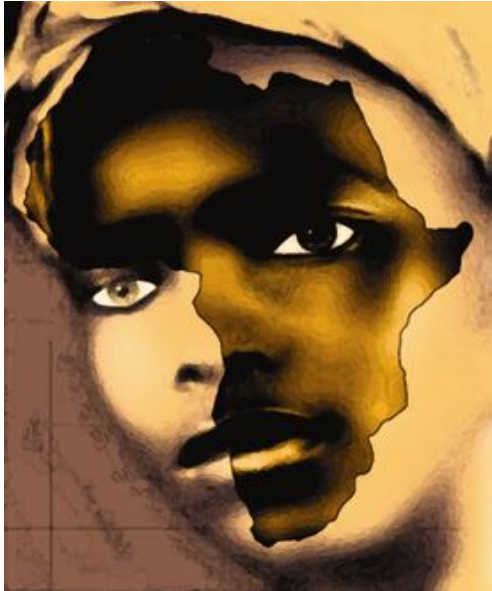
Commissioned by clients from outside the country of research

- (2010) - 51%
- (2009) - 43%

Base n=8 firms



Research Types

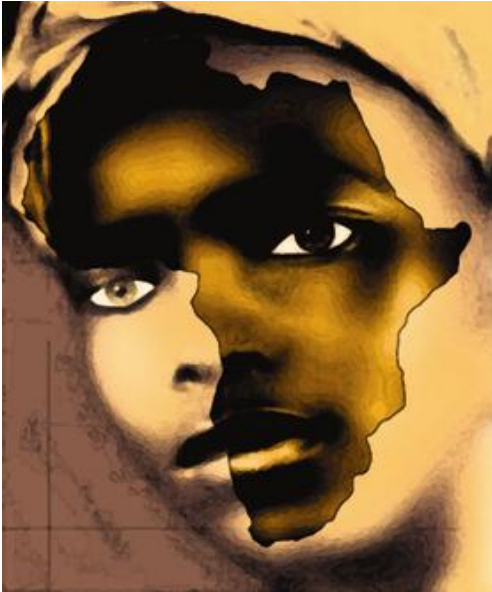


	Percentage
Market	81.5
Social	18.5
Consumer	61.9
Non-Consumer	28.1
Qualitative	32.4
Quantitative	67.6
Ad hoc	57.5
Omnibus	1.7
Panels	10.3
Other Continuous	25.4
Unspecified	5

Compared to 2008, qualitative research has immensely grown from 16% to 32.4% in 2010

Base n=8 firms

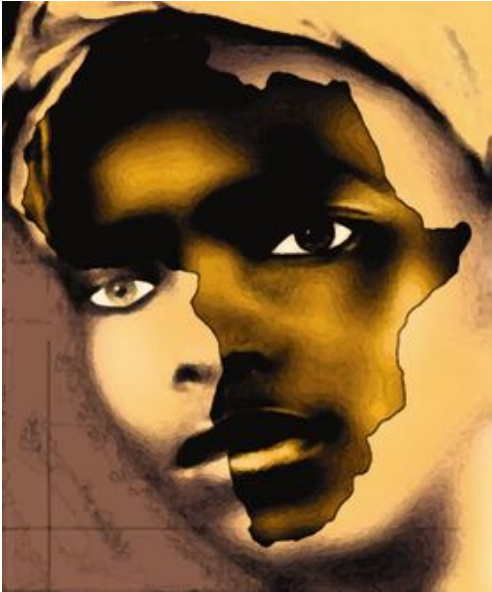
Data collection methodologies



		Percentage
Qualitative	Focus groups	63.8
	In-depths	28.1
	Other Qualitative	9.3
Quantitative	Face-to-face	79.1
	Telephone	15.0
	Internet	2.1
	Other Quant	3.8
	Mail/postal	0.0

Base n=8 firms

Agency Infrastructure/Facilities owned



8

- Data processing

4

- Computer Assisted Telephone Interviewing Facilities

3

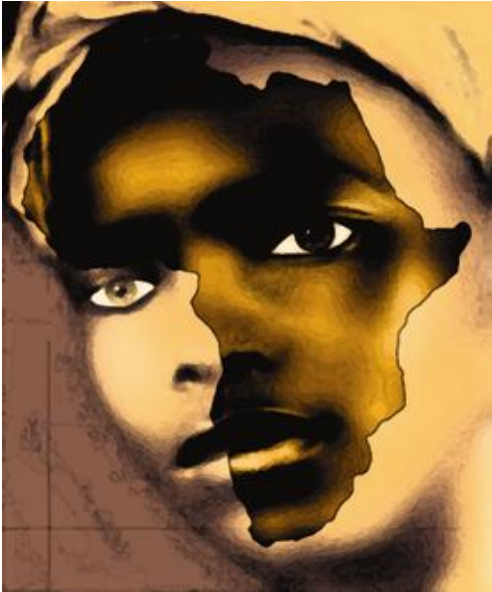
- Computer Assisted Personal Interviewing facilities

2

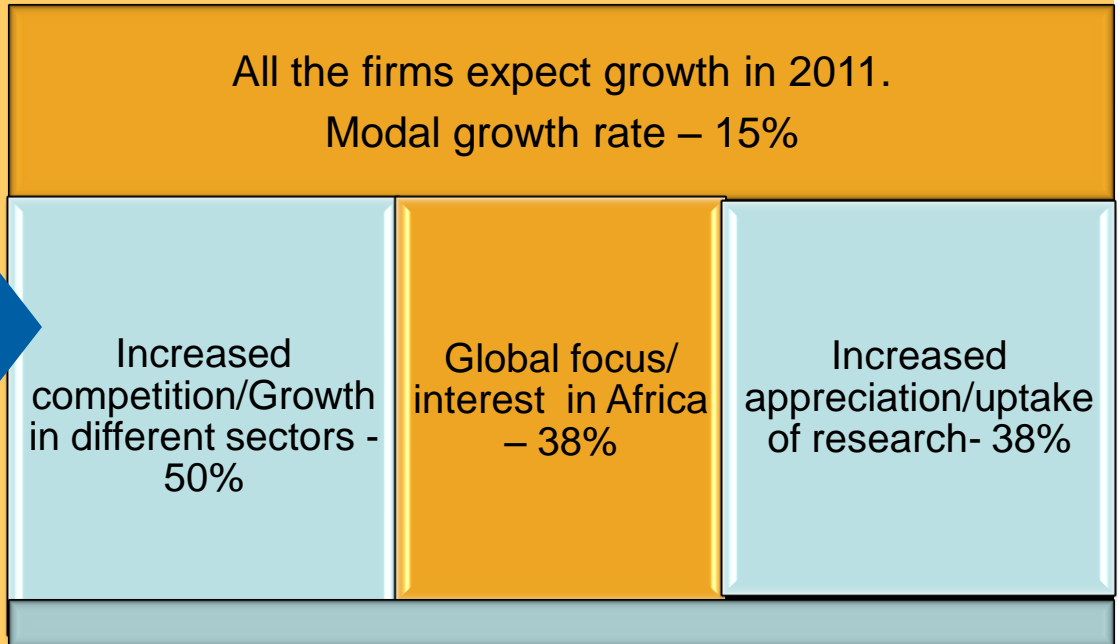
- Room for group discussions with viewing gallery / one way mirror

Base n=8 firms

Africa MR growth in 2011 from 2010



Main Drivers



Base n=8 firms

A composite image featuring a woman's face on the left and a map of Africa on the right, both rendered in a golden-brown, textured style. The woman's face is partially obscured by the map, symbolizing the intersection of Africa and global markets.

“Africa, the New Frontier?”

Thank you



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