

ESOMAR INDUSTRY REPORT 2012

Africa Highlights

Global MR Turnover in 2011

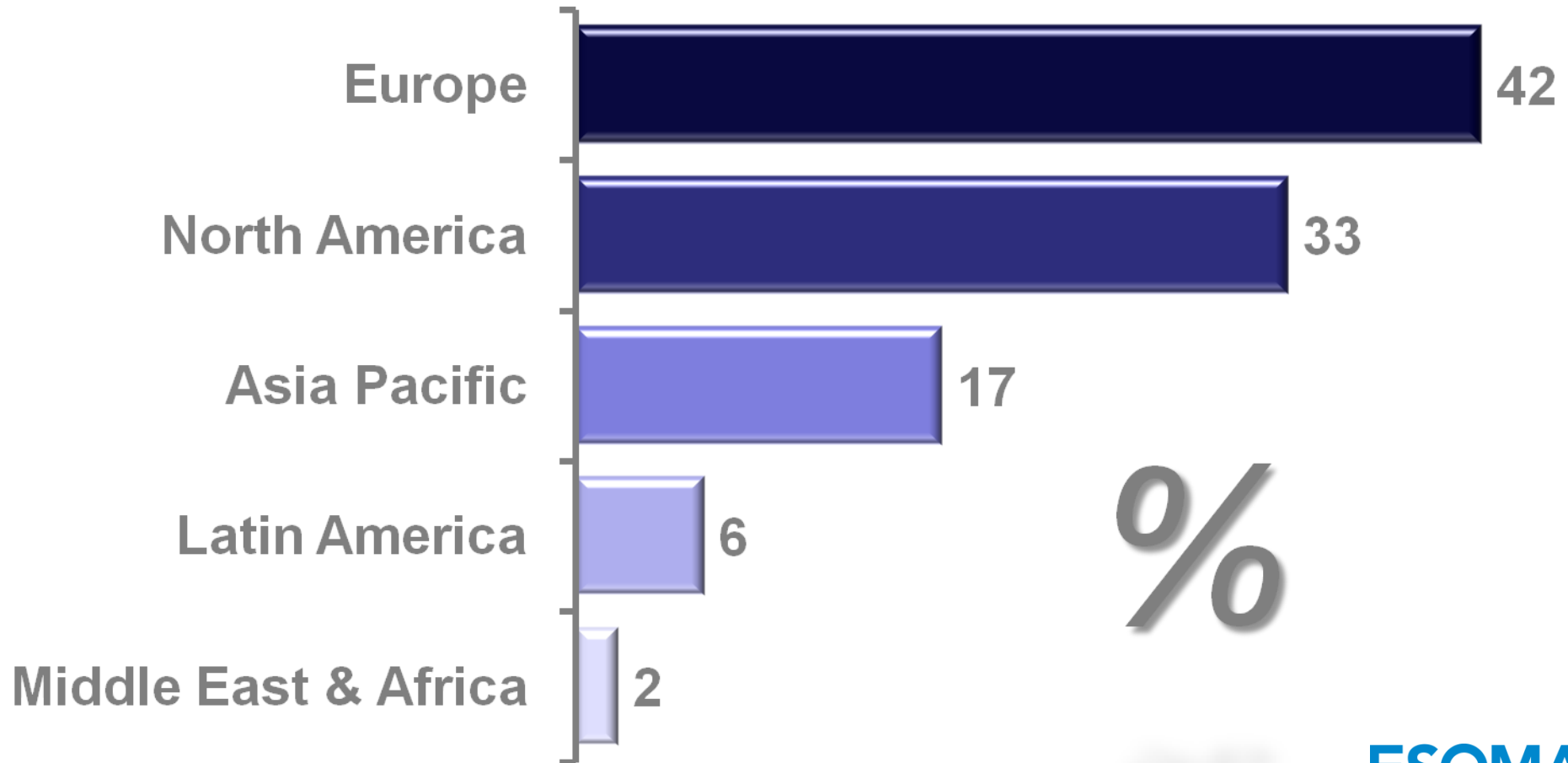
- Global MR turnover stood at 33.5 billion US\$
 - Increase of 3.8% vis-à-vis 2010
 - 0.4% adjusted for inflation
- Middle East/Africa Region accounted for 2% of global MR spend (601 million US\$)
 - 4.8% growth against 2010
 - adjusted for inflation, decline of 1.3%



Global MR Turnover

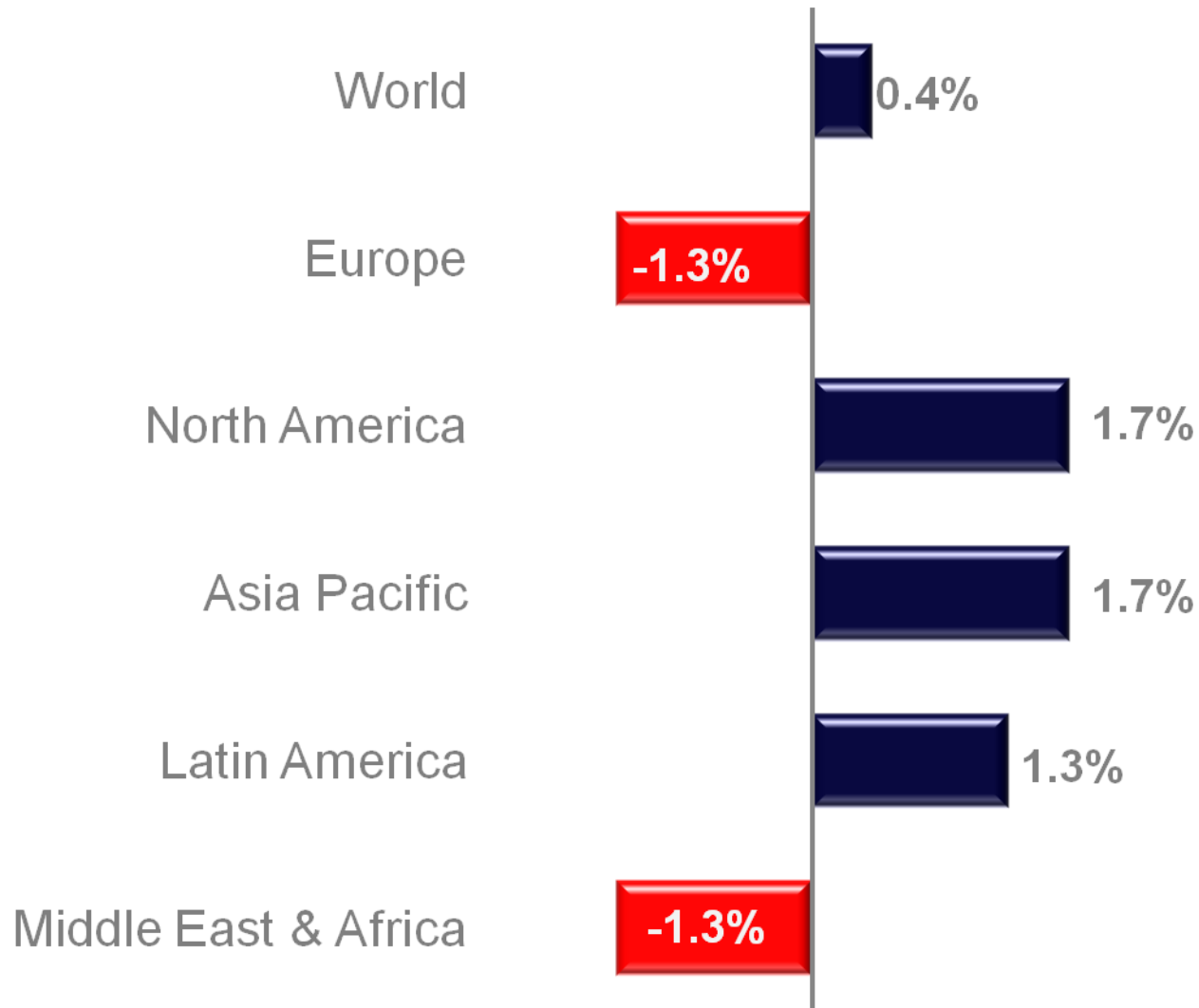
– *by Region*

- **Global Turnover: 33.54 billion US\$**



Growth Rates by Region

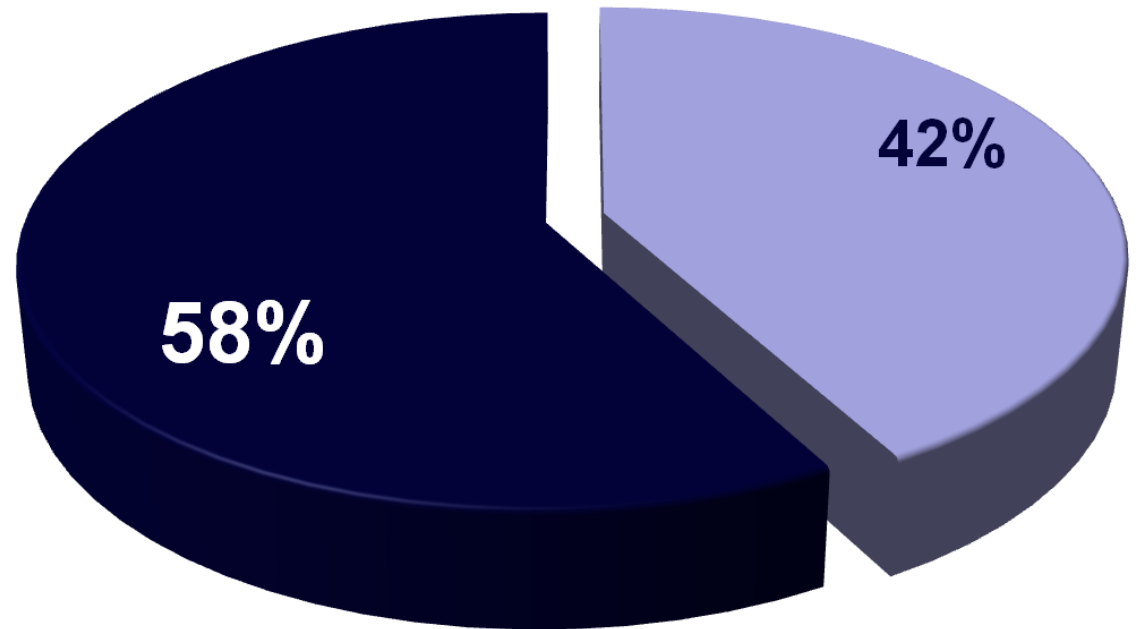
Adjusted for Inflation



Africa MR Turnover in 2011

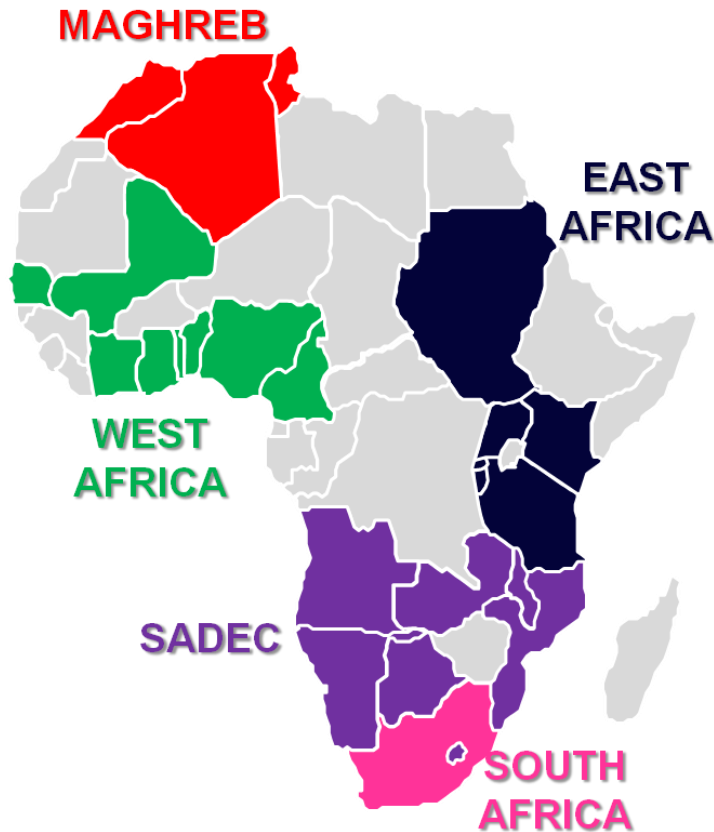
- Middle East & Africa Turnover: 601 million US\$

- Middle East: 255 million US\$
- Africa: 346 million US\$



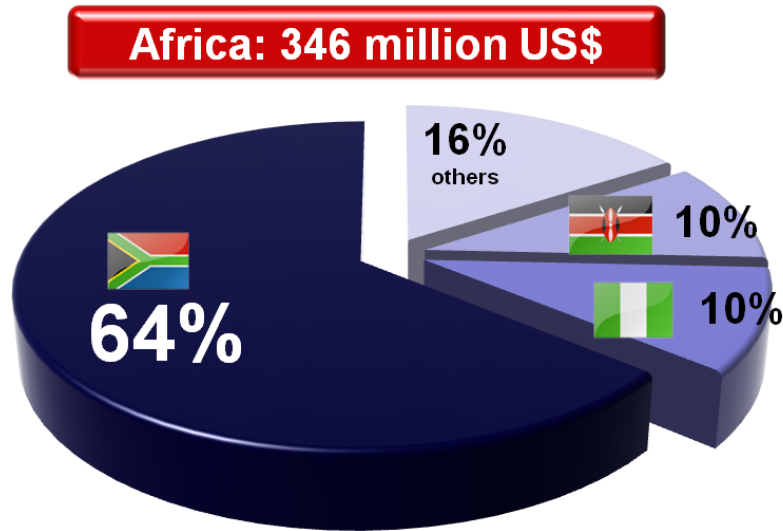
Africa – Regional Turnover

- Trend



	Turnover: US\$ million			Absolute Growth (%)	Net Growth (%)
	2009	2010	2011	2010/2011	2010/2011
South Africa	156	219	222	0.4	-4.3
West Africa	46	48	53	11.4	2.3
East Africa	34	35	35	-0.8	-12.6
Maghreb	20	22	23	5.1	1.7
Sadec	9	11	13	19.0	7.0
Africa (Total)	265	334	346	2.8	-3.5

Turnover by Major Markets



	2009	2010	2011
	156m \$	219m \$	222m \$
	19m \$	27m \$	35m \$
	n/a	30m \$	34m \$

- Although MR turnover marginally increases in absolute terms, growth is negative when inflation is factored in
- There are only 3 hubs for MR in Sub-Saharan Africa, with a combined share of 84%
- Net Growth was experienced only by Nigeria
- MR Spend per Capita:
 - RSA: \$4.39
 - Kenya: \$0.84
 - Nigeria: \$0.22

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- improve and promote international best practice
- promote the value of the industry to business and society



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