



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

Opening remarks



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.

Opening remarks Contd



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?

Industry Survey 2014- 2016 Trends (KENYA – MSRA)



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**.
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- 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.

Back to the Conference – The structure



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

Back to the Conference – Why this Topic?



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 its 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?)

White Papers & Research Papers – The structure



- 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.

Our Sponsor - Kantar



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!