

Statistics in focus

INDUSTRY, TRADE AND SERVICES

THEME 4 – 6/2004

Contents

Introduction	1
Total turnover share of market research and public opinion polling and advertising services products.....	2
Detailed turnover by product...	3
Product specialisation.....	4
Turnover by client.....	5
Residence of clients	6

Market Research and Public Opinion Polling and Advertising Services

Pekka Alajääskö and Owen Blackburn

- Advertising shows product specialization of over 80% in majority of reporting countries
- Over 80% of total turnover is generated by enterprise clients for Market Research and Public Opinion Polling services in all reporting countries
- Market Research and Public Opinion Polling services reports over 70% resident clients
- Product specialization in Market Research and Public Opinion Polling services reveals specialization of over 80% in 4 of the 6 reporting countries.

Introduction

In mid-1999 Eurostat, with the support of DG Enterprise, began a project to improve the statistical coverage of the business services sector. After the initial methodological development and a testing period in 2001, participating Member States launched a survey on computer services for the reference year 2000. As part of the above project, another survey on computer services and other business services was launched in 2002 for the reference year 2001.

This Statistics In Focus presents results from the reference year 2001 survey on market research and public opinion polling (NACE 74.13) and advertising services (NACE 74.4). Eight Member States (Denmark, Spain, France, Ireland, Portugal, Finland, Sweden and the United Kingdom) have provided partial or full sets of data to Eurostat. This SIF concentrates on turnover data, broken down by client and product.

As the turnover figures can vary greatly across the participating countries and some of the data is still provisional, only the percentage share of turnover is given in the following graphs and tables. Data are derived from sample surveys. In some cases response rates could be relatively low, therefore care should be taken when interpreting the data. A more comprehensive analysis on market research and public opinion polling and advertising services turnover, personnel costs, number of persons employed and value added data will be carried out in the future.

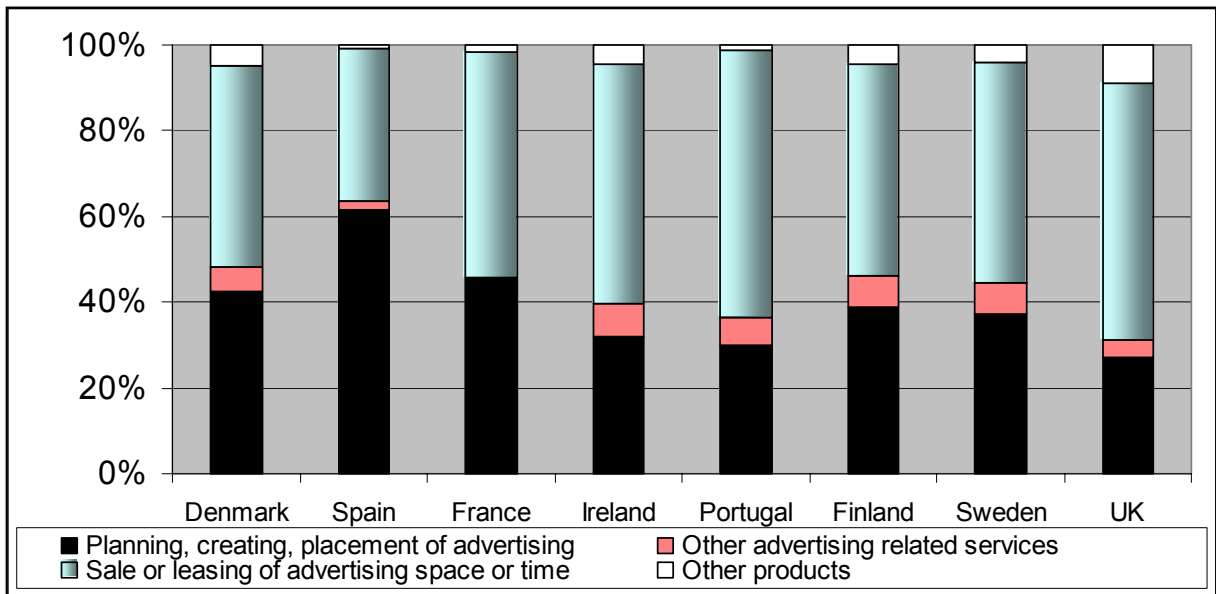


Total turnover share of market research and public opinion polling and advertising services products

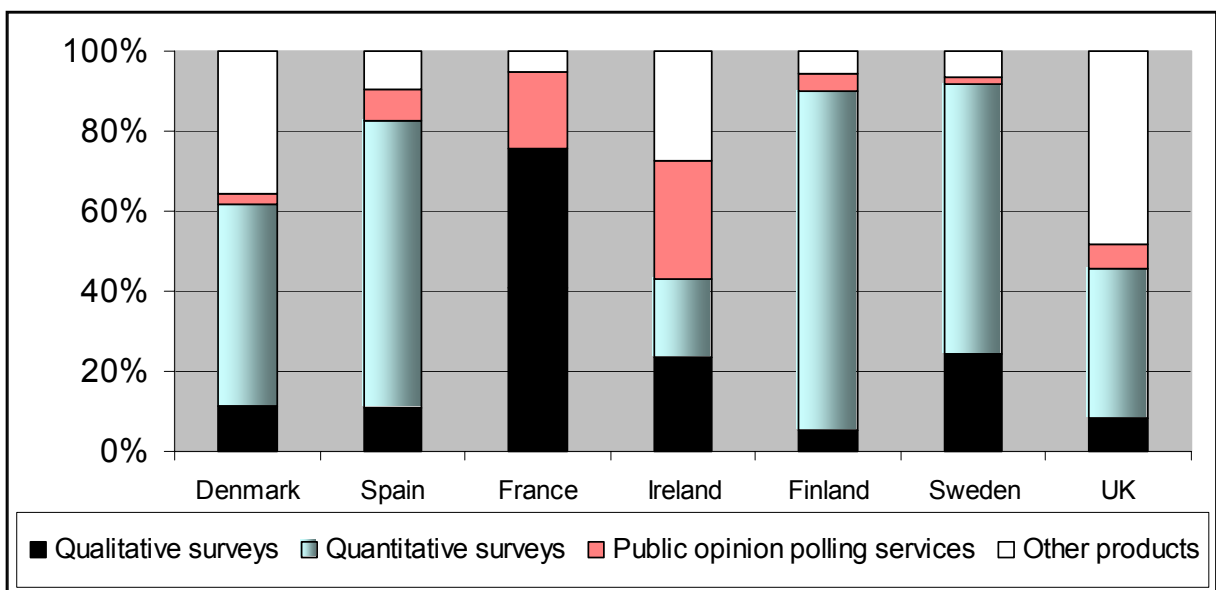
Market research and public opinion polling products – qualitative surveys, quantitative regular and ad-hoc surveys and public opinion polling – generate more than 60% of total turnover for this sector in all reporting Member States except in the United Kingdom. In the United Kingdom the share is just above 50%. In Spain, France, Finland and Sweden, on the other hand, this share is above 90%.

Advertising services products – planning, creating and placement of advertising services and other advertising related services – generate less than 50% of total turnover in all participating countries except in Spain. Including “Sale or leasing of advertising space or time” with the other advertising services products, this generates more than 90% of the turnover in all countries.

Graph 1. Advertising – Main Products Share of Total Turnover



Graph 2. Market Research and Public Opinion Polling – Main Products share of Total Turnover



Detailed turnover by product

As Tables 1 and 2 show, "Other products n.e.c." has a significant turnover share in some Member States for NACE 74.13, but not for NACE 74.4. This residual heading is a difficult category as it contains products that the enterprises were not able (or perhaps willing) to classify under proper headings. This residual

category should preferably have only a small share of turnover – but in DK and the UK it represents 29% and 36% respectively of turnover for NACE 74.13, compared with a maximum of 8% in the UK for NACE 74.4.

Table 1. NACE 74.4 – Detailed Advertising Product Data

	DK	ES	FR	IE	PT	FI	SE	UK
Software supply	0,7	0,0	0,0	0,0	0,0	0,0	0,3	0,1
Sale of advertising space	47,8	35,8	52,4	56,6	62,2	49,4	51,4	59,6
Full service advertising	18,0	52,1	45,8	27,3	16,1	25,2	25,1	18,1
Direct marketing	13,8	5,2	0,0	1,4	4,1	3,8	7,2	7,2
Advertising design	10,8	4,2	0,0	3,3	9,7	11,1	4,9	2,9
Photography services	0,7	0,2	0,0	0,1	0,1	2,9	0,4	0,3
Production of films	2,3	0,7	0,0	0,9	0,2	0,4	0,7	1,5
Public relation services	0,8	0,3	0,1	0,0	0,0	0,4	1,0	0,6
Compiling and selling lists	0,1	0,1	0,0	0,6	0,7	0,0	1,2	0,2
Other advertising services	1,7	0,6	0,0	6,0	5,7	3,2	4,2	1,6
Market research services	0,4	0,0	0,0	0,8	0,1	0,2	1,5	0,4
Other products n.e.c.	2,9	0,8	1,7	3,0	1,1	3,4	2,1	7,5
Total	100	100	100	100	100	100	100	100

Note 1: Graph 1 relates to Table 1. In graph 1, the heading "Planning, creating and placement of advertising" corresponds to the following headings in Table 1; Full service advertising, Direct Marketing and Advertising design. The heading "Other advertising related services" corresponds to the following headings in Table 1; Photography services, Production of films, Public relation services and Compiling and selling lists.

Note 2: For table 2, France reported a total turnover figure for Qualitative and Quantitative surveys but was unable to give a breakdown for these products. The percentage of total turnover is given in brackets in table 2 to distinguish this figure. This representation is shown in graph 2 as a total turnover amount under Qualitative Surveys.

Table 2. NACE 74.13 – Detailed Market Research and Public Opinion Polling Product Data

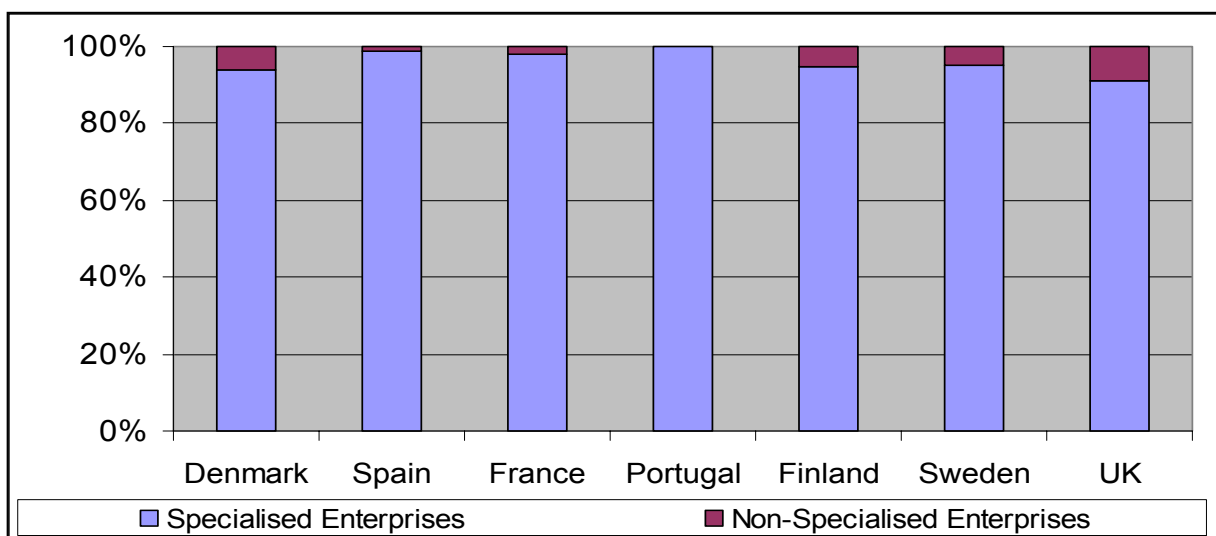
	DK	ES	FR	IE	FI	SE	UK
Software supply	0,1	0,0	0,0	0,0	0,0	2,0	0,2
Other computer services	0,7	0,0	0,1	0,0	1,7	0,0	0,0
Sale of advertising space	0,0	0,0	0,1	0,0	0,0	1,8	:
Other advertising related services	2,9	0,0	0,0	11,2	0,0	0,0	0,9
Qualitative surveys	11,7	10,9	(75,7)	23,7	5,3	24,4	8,4
Quantitative ad-hoc surveys	22,4	20,9	:	8,9	39,0	33,4	23,4
Quantitative regular surveys	27,9	50,6	:	10,4	45,9	33,9	14,0
Public opinion polling services	2,5	7,9	19,3	29,5	4,3	2,0	5,9
Business/management consultancy	1,6	0,0	0,6	5,3	0,2	1,1	11,3
Training services	1,2	0,9	0,2	7,8	0,1	0,0	0,3
Other products n.e.c.	29,0	8,8	4,0	3,2	3,5	1,4	35,6
Total	100	100	100	100	100	100	100

Product specialisation

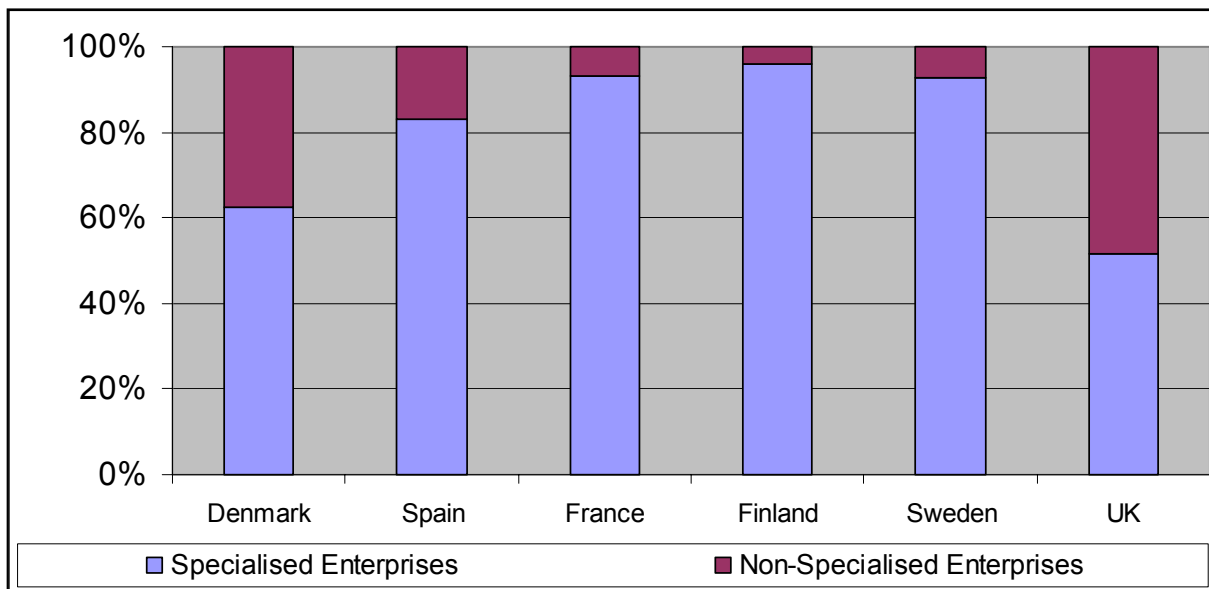
From the economic point of view the question is, how dependent each economic activity is on its main product, or how large or small is the product variation/concentration, and consequently how dependent enterprises are on the market evolution of each product. For the purpose of this study market research and public opinion polling and advertising services enterprises have been defined as product-specialised if more than 75% of their turnover comes

from the main product of the respective economic activity group. The turnover share of product-specialised enterprises is above 80% in all countries except in Denmark and the United Kingdom for market research and public opinion polling and over 90% for all reporting countries for advertising services. In all Member States enterprises seem to be very product-specialised for both economic sectors.

Graph 3. Advertising – Turnover by Product Specialisation



Graph 4. Market Research and Public Opinion Polling – Turnover by Product Specialisation

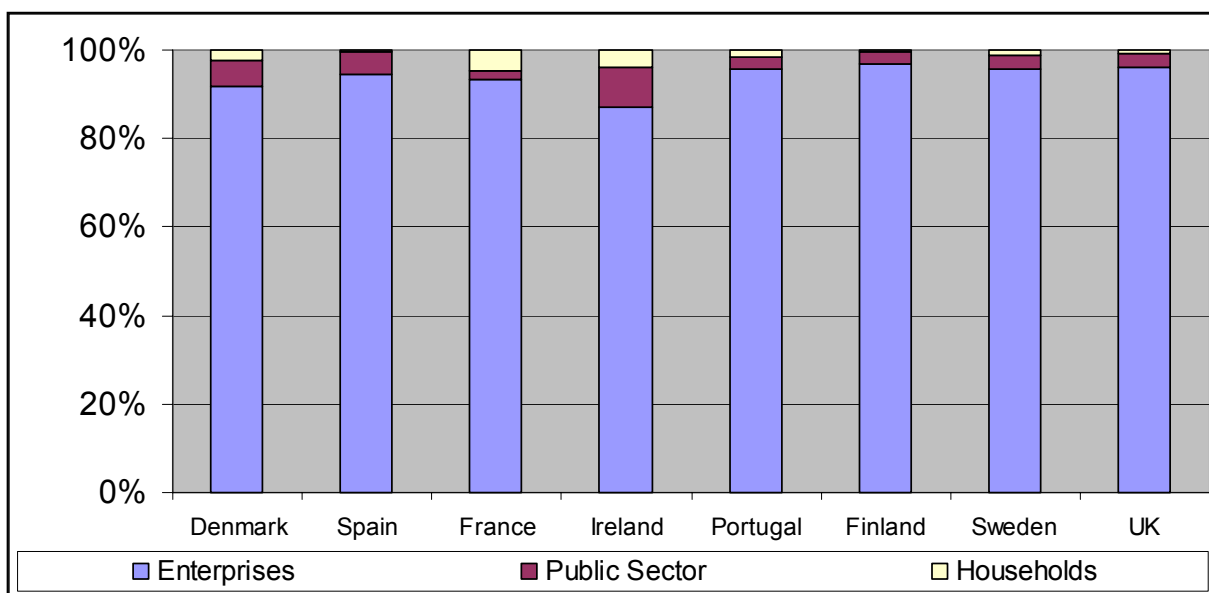


Turnover by client

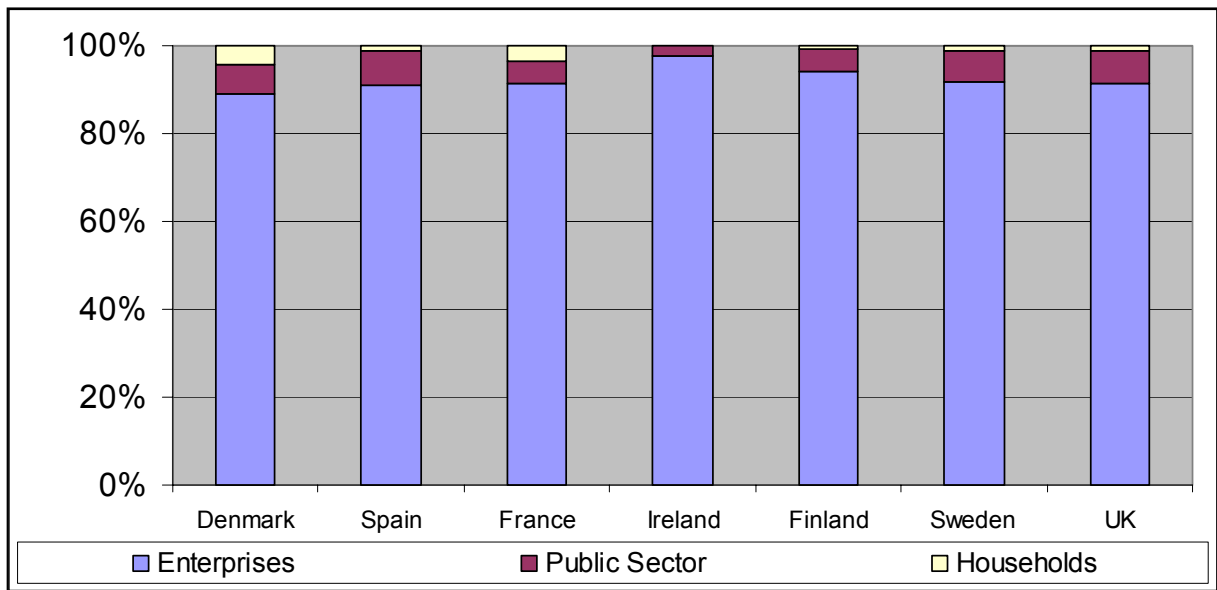
Enterprises are by far the most important group of clients for market research and public opinion polling and advertising services in all reporting countries. The share of enterprise clients is never less than 80%. The public sector is an important client (share around 8%) for market research and public opinion polling in Spain, Sweden and the United Kingdom.

The public sector’s share of advertising services in Ireland is significant. It amounts to around 9% of total turnover for this sector. Households have a turnover share around 5% in market research and public opinion polling in Denmark and in France for advertising services.

Graph 5. Advertising – Turnover by Type of Client



Graph 6. Market Research and Public Opinion Polling – Turnover by Type of Client

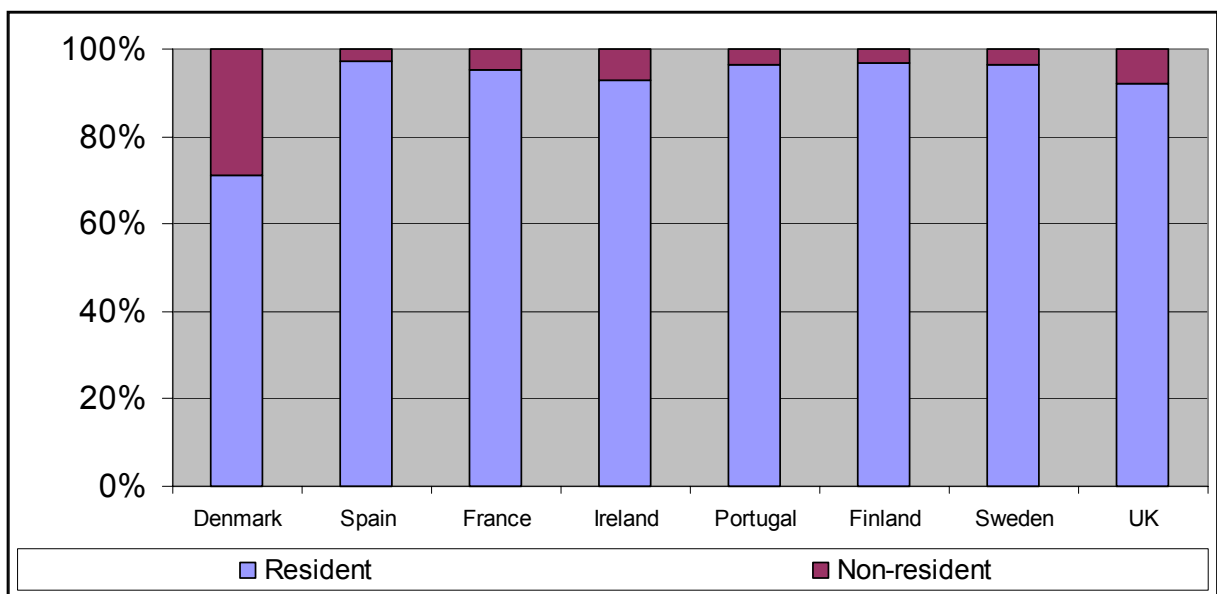


Residence of clients

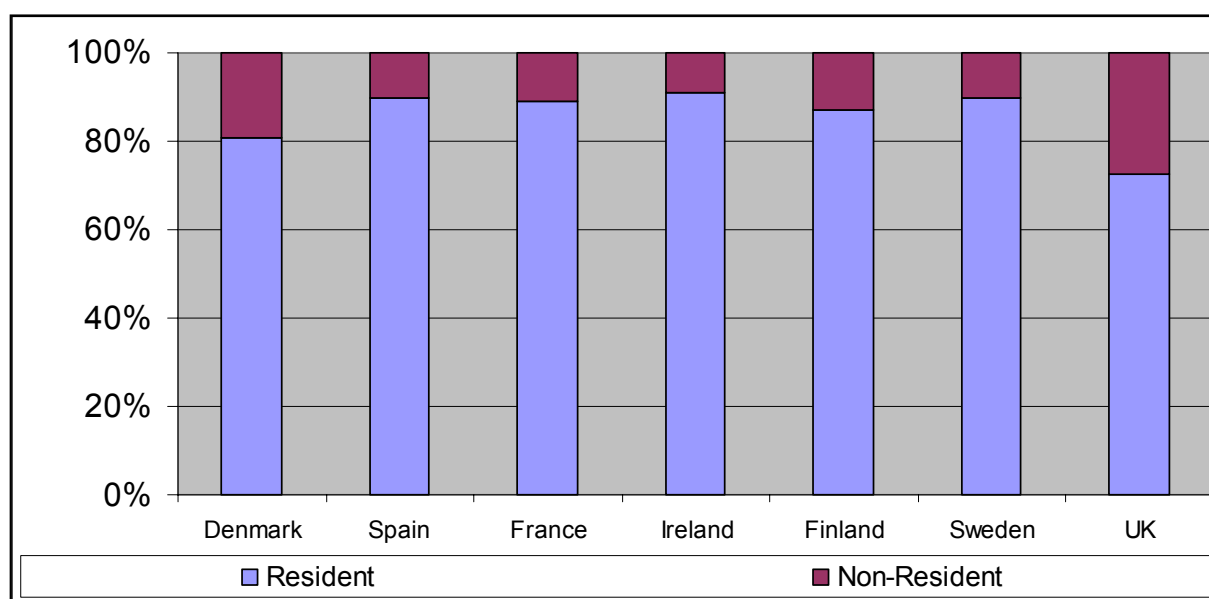
Data on the country of residence of clients, in addition to providing a very rough estimate of the location of clients, can naturally be compared with any data on exports of services available from other sources, thus providing an additional source and check on data that are relatively difficult to obtain. Concerning the country of residence of client enterprises, resident enterprises form the clear

majority of market research and public opinion polling and advertising services clientele. The share of non-resident clients is above 20% in market research and public opinion polling only in the United Kingdom. In advertising services this share is above 20% only in Denmark. In other countries the share of resident clients is always around or above 90%.

Graph 7. Advertising – Turnover by residence of Client



Graph 8. Market Research and Public Opinion Polling – Turnover by Residency of Client



For further information on Business Services, please consult Statistics In Focus 27/2003 – Computer Services and Statistics In Focus 25/2002 – Computer Services.

➤ **ESSENTIAL INFORMATION – METHODOLOGICAL NOTES**

Economic Activities

Economic activities in Market Research and Public Opinion Polling and Advertising Services are classified using the common basis for statistical classification of economic activities within the EU: NACE Rev.1.

NACE group:

74.14: Market Research and Public Opinion Polling Services

74.4: Advertising Services

Product specialisation

An enterprise has been considered product specialised, if its most important product is consistent with the main activity of the enterprise and comprises at least 75% of its total net turnover.

Turnover

Turnover comprises the totals invoiced by the observation unit during the reference period, which corresponds to market sales of goods or services supplied to third parties. It includes all duties and taxes on the goods and services invoiced by the unit, with the exception of the VAT invoiced by the unit vis-à-vis its customers and other similar deductible taxes directly linked to turnover.

Symbols

: Data not available or confidential

Further information:

➤ Databases

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