International Business Insights Study 2014

Survey Report June 2014

Survey background

The International Business Insights Study

- This report covers the findings of the 2014 AMEC International Business Insights Survey, an annual industry benchmarking survey which has been carried out since 2008

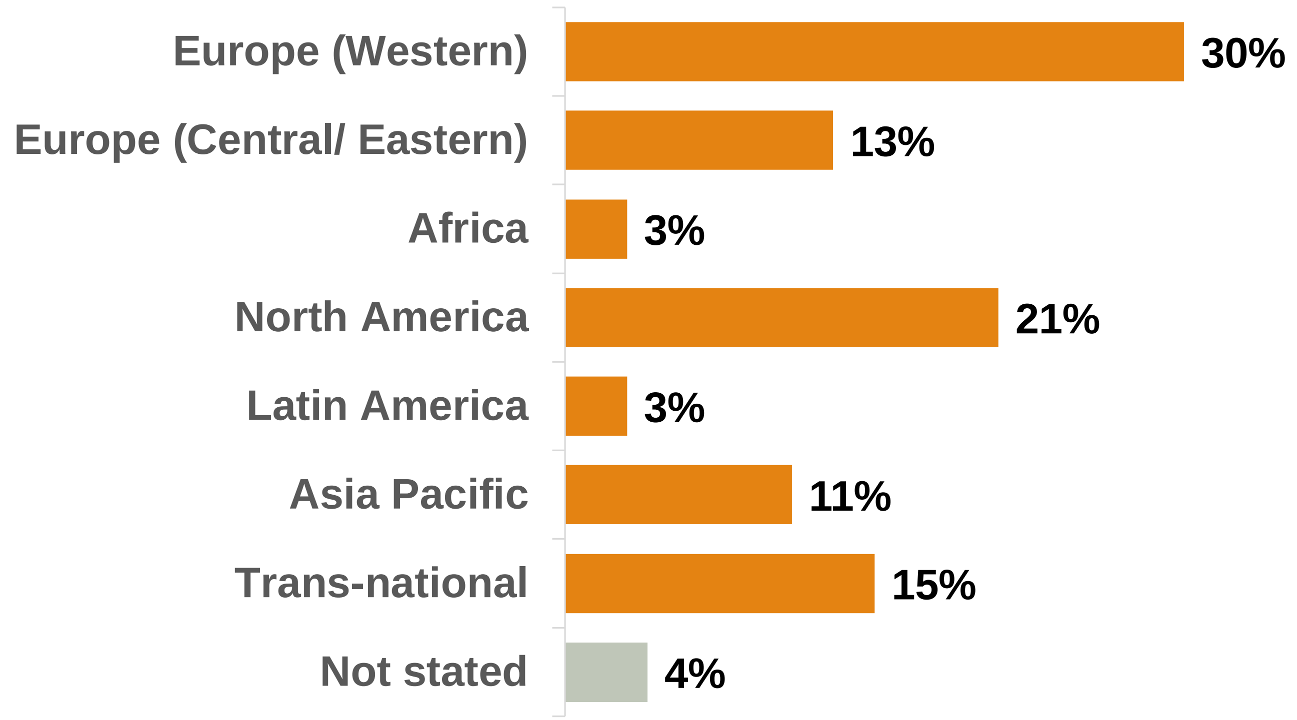
- The online survey is designed to be completed by MD/ CEO level participants and invitations are sent to all current AMEC members
  - In total, 87 organisations qualify for inclusion in the 2014 survey
  - 72 completed survey submissions were received in the survey period – an impressively high response rate of 83%
  - Research was carried out between 31st March and 12th May 2014

- Points to note when reading the report
  - Where combined percentage figures do not sum to 100%, this is likely to be a result of a) rounding to the nearest whole percentage or b) exclusion of “don’t know” and/or blank answers from the display on the chart
  - Base sizes may vary between questions as some questions were left blank by some participants (including the section on financial matters which is not asked of companies which cannot submit this type of information under Sarbanes-Oxley)

The survey participants – global spread

42% carry out work across a number of regions

54% work mostly/ entirely within one region



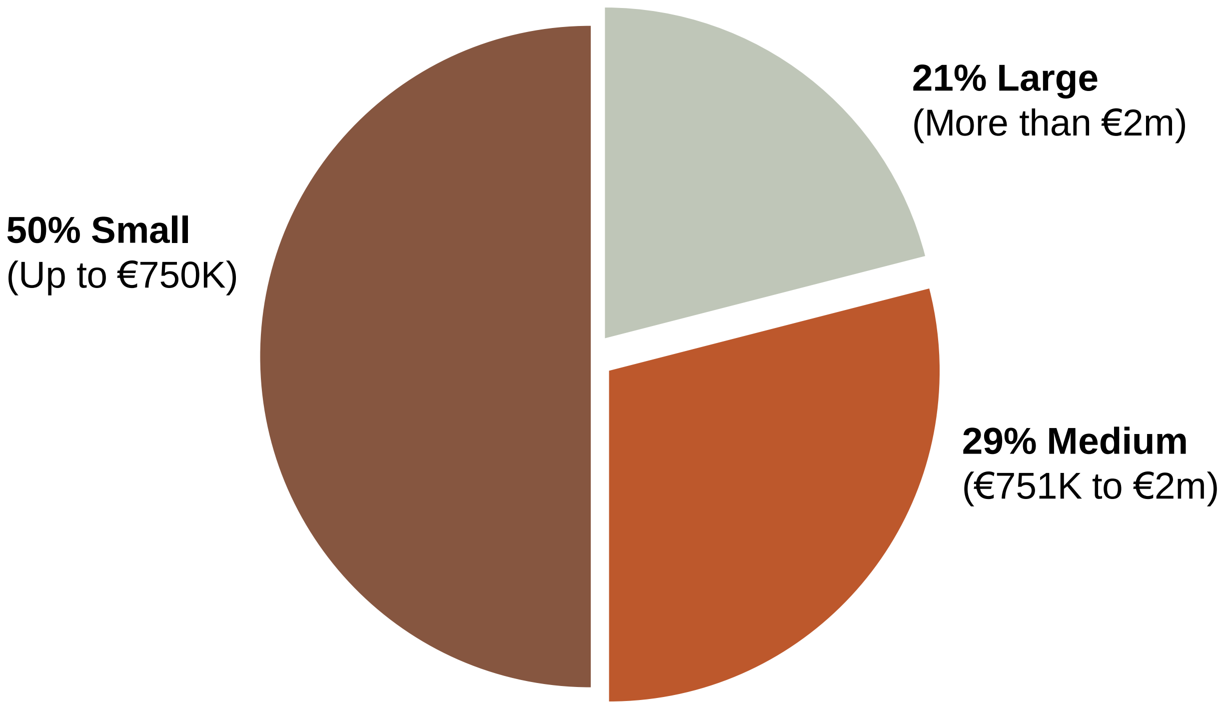
- AMEC members were asked to give a % breakdown of the global regions where they carry out business
- Just over half work mostly / entirely in one region, but more than two in five work in widely dispersed locations
- The chart shows allocation of AMEC members to a “home” region where they currently carry out 50%+ of their business
- 43% of members are located in Europe, 21% in North America and 11% in Asia Pacific
- 15% do not carry out 50%+ of their business in any one region, and so are classified as “trans-national”

Base: All (72) Q Please complete this question by indicating the proportion of your business carried out in each region

The survey participants – size of business

53% give details of company size based on annual income

47% cannot/choose not to give financial information



- Members can choose to opt out of providing details on financial performance as part of the survey, usually to reflect restrictions in place on the basis of Sarbanes-Oxley
- In total, 53% of participants for 2014 were able to share financial details
- Within this set of members, 21% have an annual income in excess of €2m and are classified as *large*
- 29% generate income in the €751K to €2m range, and are classified as *medium*, while the remaining 50% fall into the *small* category (up to €750K)

Base: All giving income figures (38) Q Please indicate the total value of all research/insights business undertaken by your organisation in y/e 31st Dec 2013

Executive summary

Executive summary - 1

Key industry trends

- Clients are focusing more on insights rather than monitoring, and increasingly want to be able to demonstrate the reputation benefits of communications
- There is also increasing interest in commissioning work which gives feedback on the outcome of communications activity and demonstrates ROI

Working with clients

- While many AMEC members do not yet work regularly in partnership with PR firms, they do recognise the importance of the role these firms can play in evangelising for the measurement and insights industry
- Members also report increasing appreciation of the value their work can add from the PR community
- More than a third of members now regularly have to work with the client procurement function when pitching for work
- The majority of clients are based in corporate communications/brand PR functions
  - Members expect a growing trend for clients to be based in social media/digital roles in the future

Executive summary - 2

Client expectations

- Most client assignments now include measuring quality as well as quantity, and approaches are expected to be transparent and easily replicated
  - Despite increased interest, measuring the impact of communications on the target audience and business results are only requirements in a minority of cases
- Demand for social media measurement continues to grow more rapidly than for any other channel
- Offline reporting is the dominant output format, with a focus on integrated monitoring and analysis, but online dashboards are also now used regularly by almost half

AMEC

- While many members regularly reference the Barcelona Principles, a significant number use them infrequently, often because they think clients won't be interested
- Members strongly endorse the importance of AMEC's role in educating the marketplace
- They also want AMEC to align with more PR member trade bodies internationally

Executive summary - 3

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Working relationships

- Many members currently do little in the way of partnership working, but this is a growing trend and is seen as a positive way to strengthen the client proposition
- Most members outsource at least one aspect of the process to third party suppliers and this is also expected to grow in future
    - But there are some concerns about quality, and an accreditation/ assurance scheme from AMEC would be welcomed

Industry growth

- The majority of members who answer the financial section report revenue growth in 2013
    - On average, members grew by 9% in 2013 when compared with 2012, with the strongest growth in mid-sized firms (€751K-€2m revenue)
    - Healthcare and energy sectors are forecast to offer the strongest growth potential in 2014
    - Members see most opportunity to develop new business by offering consultative services, integrating with other marketing analytics and working internationally

1. Industry trends

Industry trends – analysis and insight

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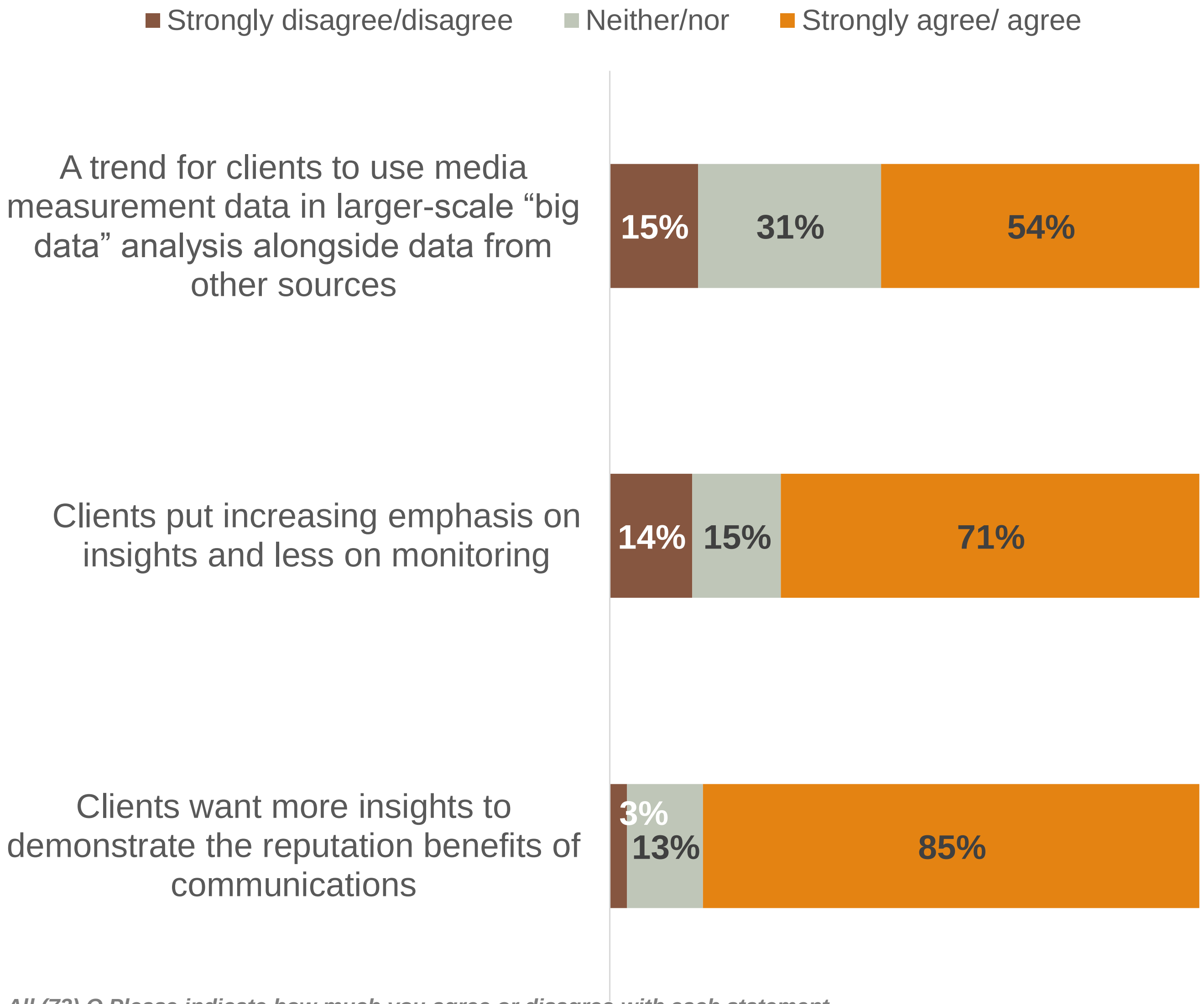
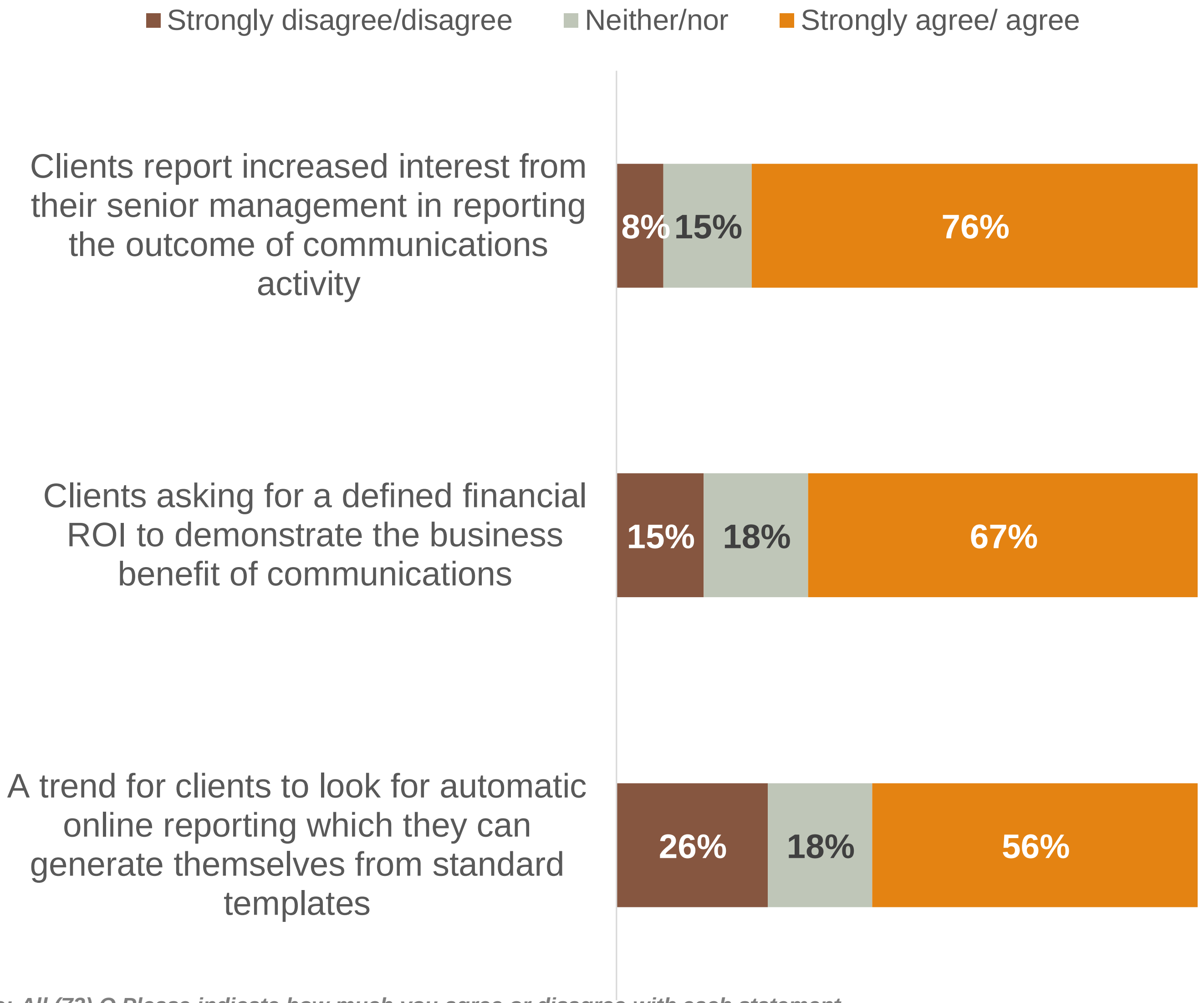


- Members are asked how much they agree that certain trends are taking hold across the industry
- More than half say they have seen a trend for clients to bring media measurement data into larger "big data" style analysis along with data from other sources, although 46% are not sure or disagree
- A clear majority feel that clients are increasingly emphasising insights rather than simply focusing on monitoring
- A comprehensive majority agree that a key driver behind client demand for more insights is to demonstrate how communications benefit reputation

Base: All (72) Q Please indicate how much you agree or disagree with each statement

Industry trends – outcomes and reporting

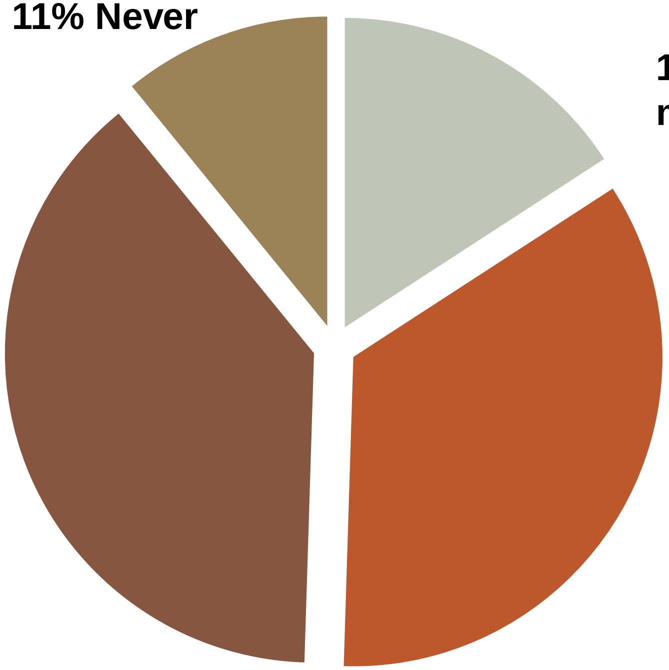


- Three in four members agree that clients are finding increased interest from senior management/ C-suite in reporting the outcome of communications activity
- A second trend related to outcomes is the increased demand for a defined financial ROI which can help demonstrate the business benefits of communications
- In terms of reporting, more than half of members have noted increased demand for automatic online reporting which they can generate themselves (although more than one in four do not believe this is a noteworthy trend)

Base: All (72) Q Please indicate how much you agree or disagree with each statement

2. Working with clients

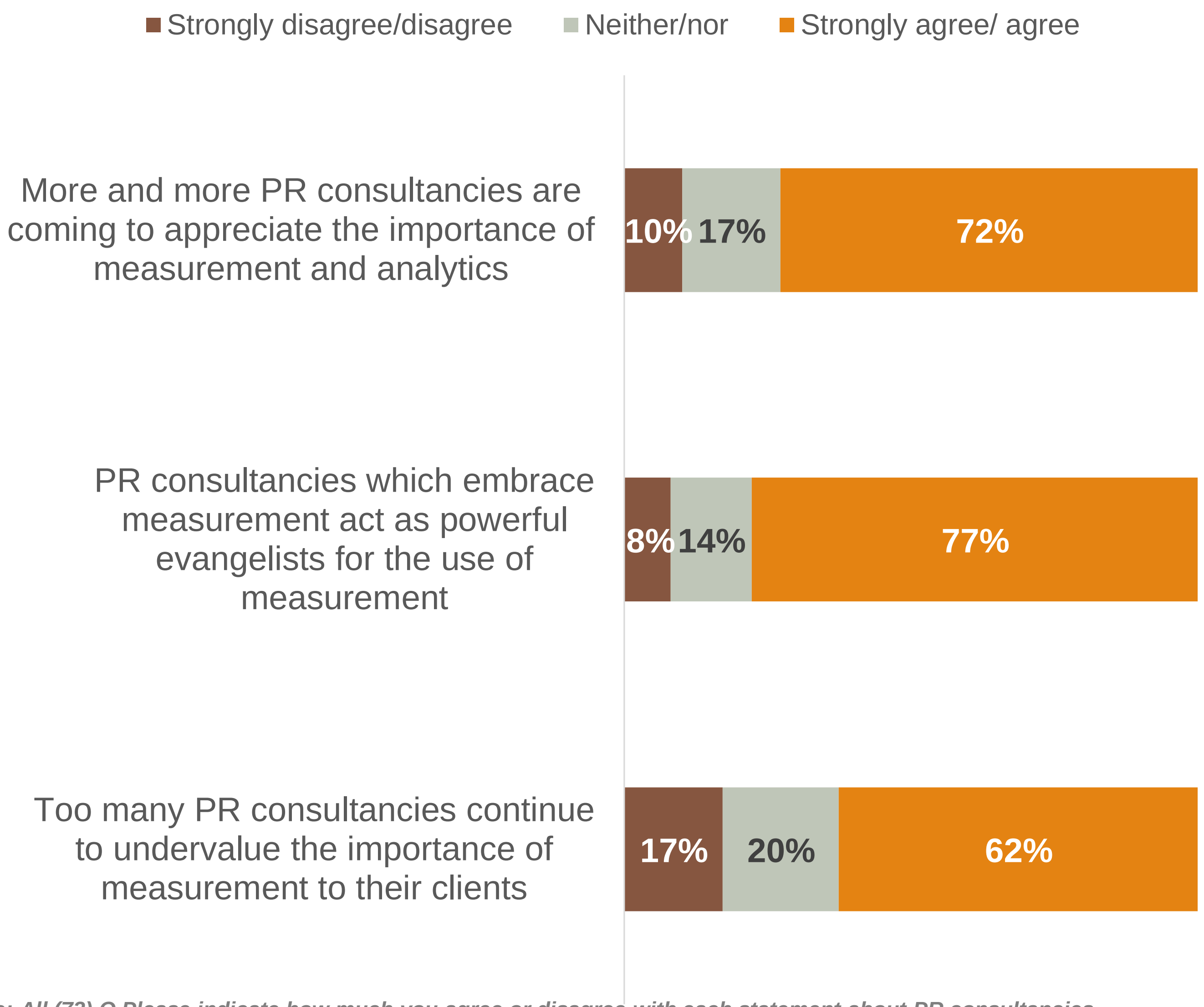
Partnership working



- This question about the frequency with which members work in partnership with PR consultancies is analysed on the basis of AMEC members who carry out measurement and evaluation services only
- On this chart, PR consultancies are therefore excluded from the analysis
- 16% say they always/mostly work in partnership with a communication/PR firm to deliver an integrated client service/integrated outputs, and a further 35% do so some of the time
- However, 50% say they rarely or never work in this way

Base: All members excluding PR consultancies (57) Q There is an increasing trend for measurement and evaluation firms to work in partnership with communications/PR consultancies in order to deliver integrated service/outputs to end clients. How frequently does your organisation work in this kind of partnership?

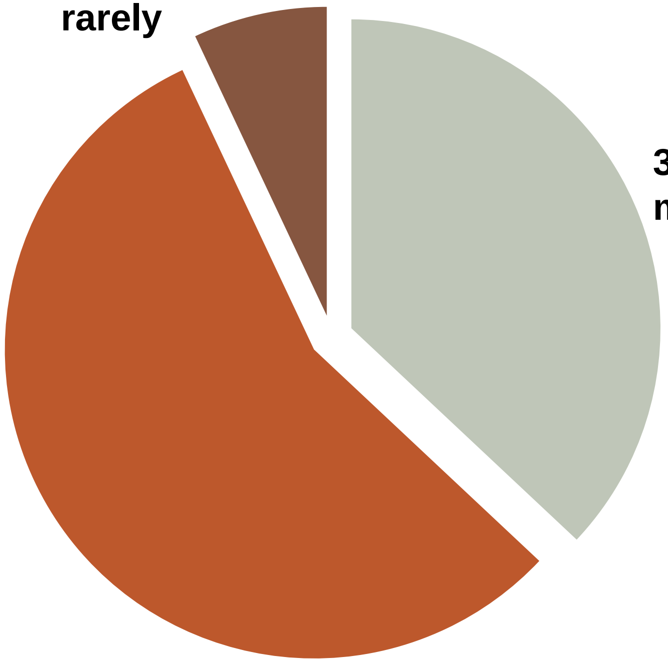
PR consultancies



- More than seven in ten members agree that PR consultancies are increasingly coming to appreciate the importance of measurement and analytics
  - Among AMEC members which are PR consultancies there is 100% agreement, compared to 65% of other types of member
- 77% of members say that those PR consultancies which have embraced measurement now act as evangelists for measurement
- However, almost two-thirds think that many PR consultancies continue to undervalue the importance of measurement to their clients
  - Even amongst AMEC's PR consultancy membership, 46% agree with this statement

Base: All (72) Q Please indicate how much you agree or disagree with each statement about PR consultancies

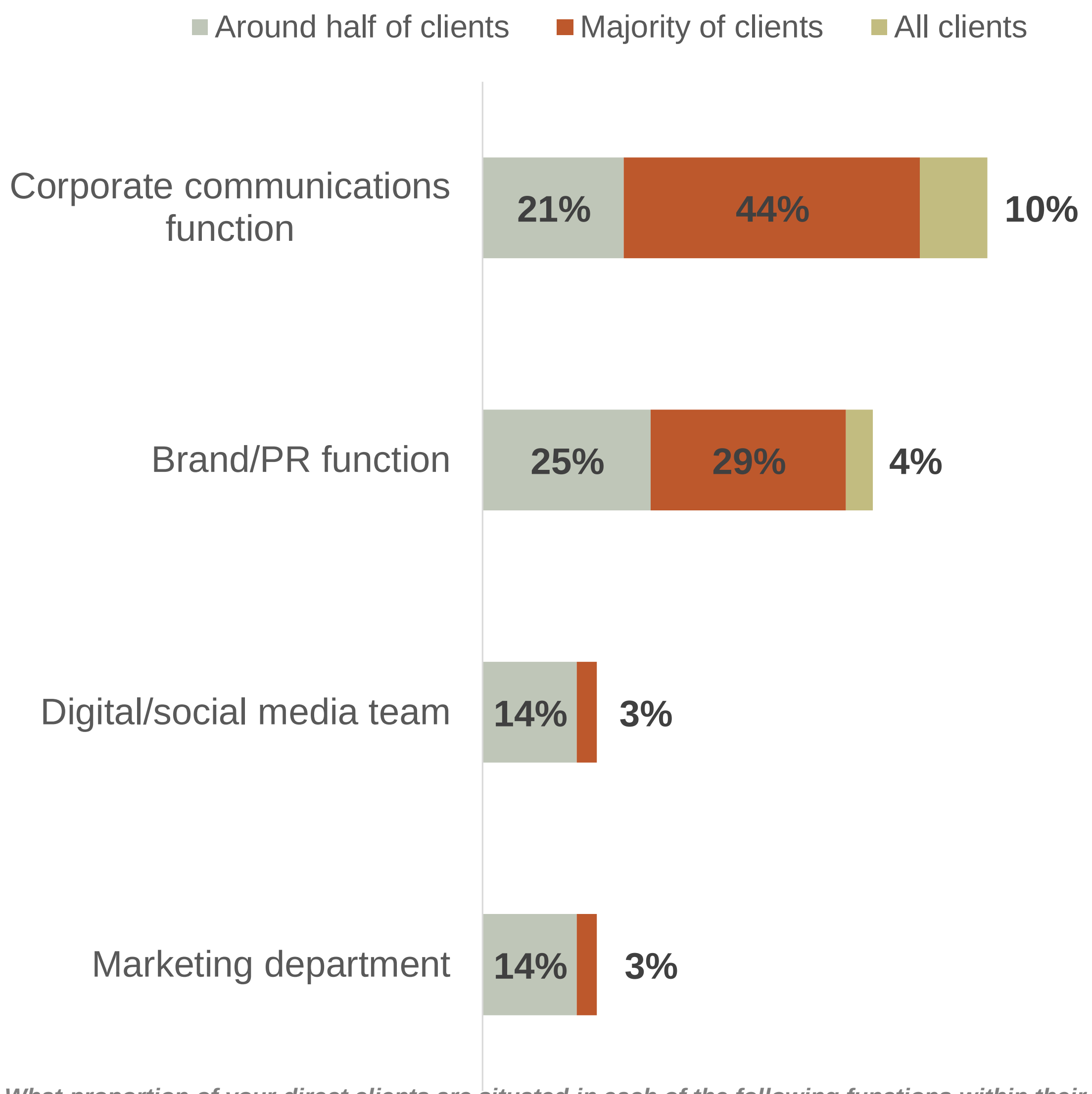
Working with procurement



- For more than a third of members (37%), client procurement departments are regularly involved in contract negotiation
    - 6% say this *always* happens, 31% say *most of the time*
- In 56% of cases, AMEC members say procurement is involved *some of the time*
- Procurement involvement is more common in North America (46% always/most of the time) and for trans-national members (45%) than in Asia Pacific (25%) or Central/Eastern Europe (11%)

Base: All (72) Q How frequently do your clients involve their procurement department in the negotiation of new/renewal contracts with your organisation?

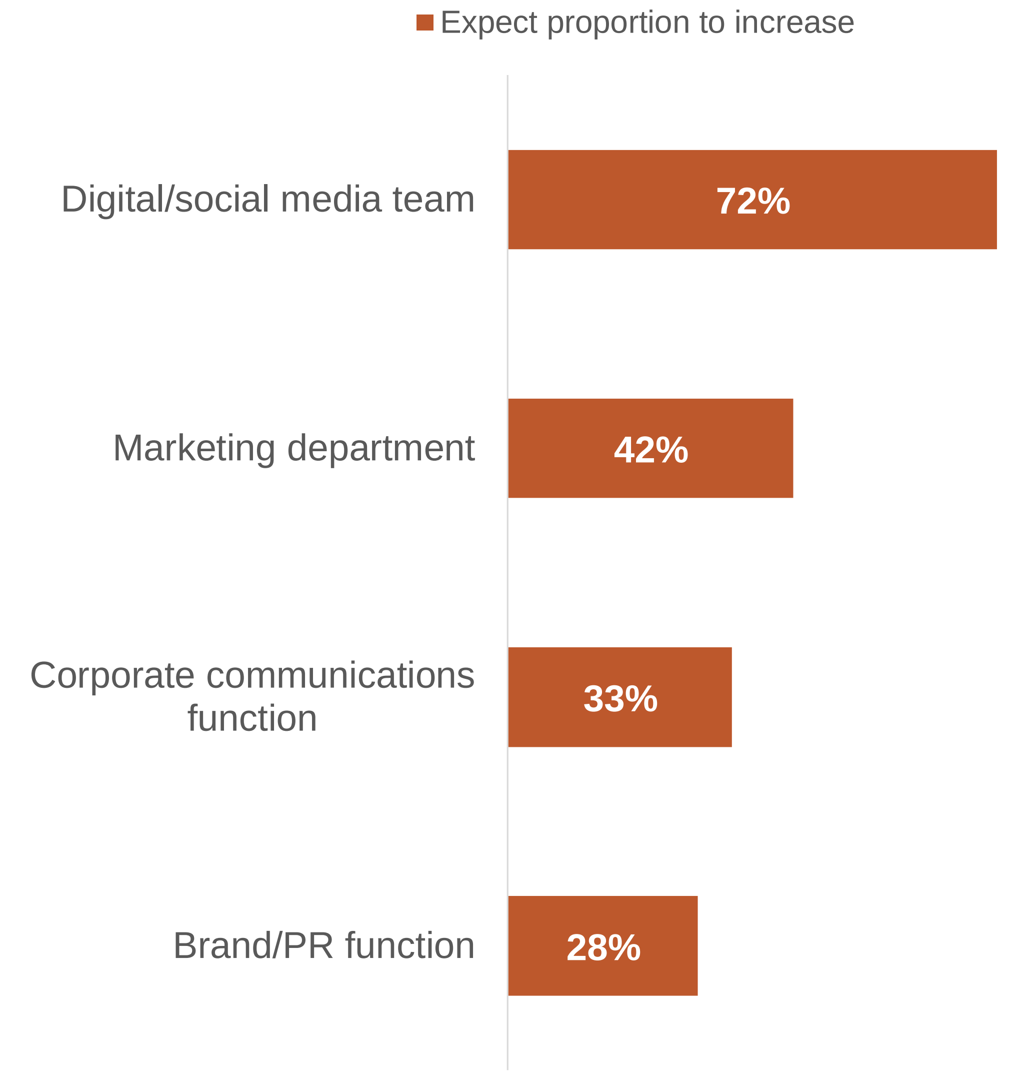
Client function



- At present, the largest segment of AMEC member clients are situated in the corporate communications function
  - 75% say that half or more of their clients sit in this function
- Almost six in ten say half or more of their clients are located in the brand/PR function
- Fewer than one in five have at least half their clients based in either the marketing department or the digital/social media team

Base: All (72) Q What proportion of your direct clients are situated in each of the following functions within their organisations?

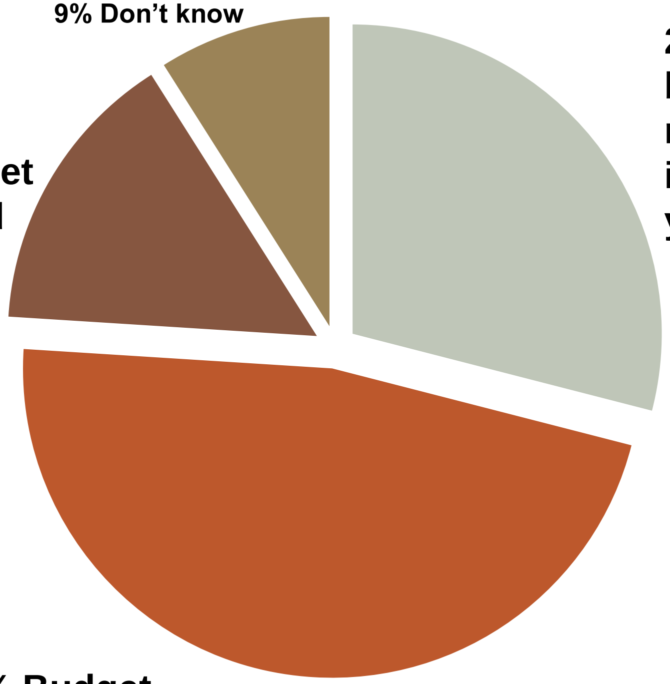
Expected changes in client function



- AMEC members forecast an increase in the number of clients based in the digital/social media function during the next 1-2 years: more than seven in ten expect this to happen
- 42% expect the number of clients based in marketing departments to grow, while smaller proportions expect an increase in the corporate communications function and the brand/PR function
- For both the brand/PR function and the corporate communications function, 13% expect a decrease in the proportion of clients
- Just 7% expect the proportion of marketing-based clients to decline and only 1% anticipateda decrease in the proportion based in social media/digital teams

Base: All (72) Q How do you expect the proportion of direct clients situated in each of these functions to change during the next one to two years?

Client budgets



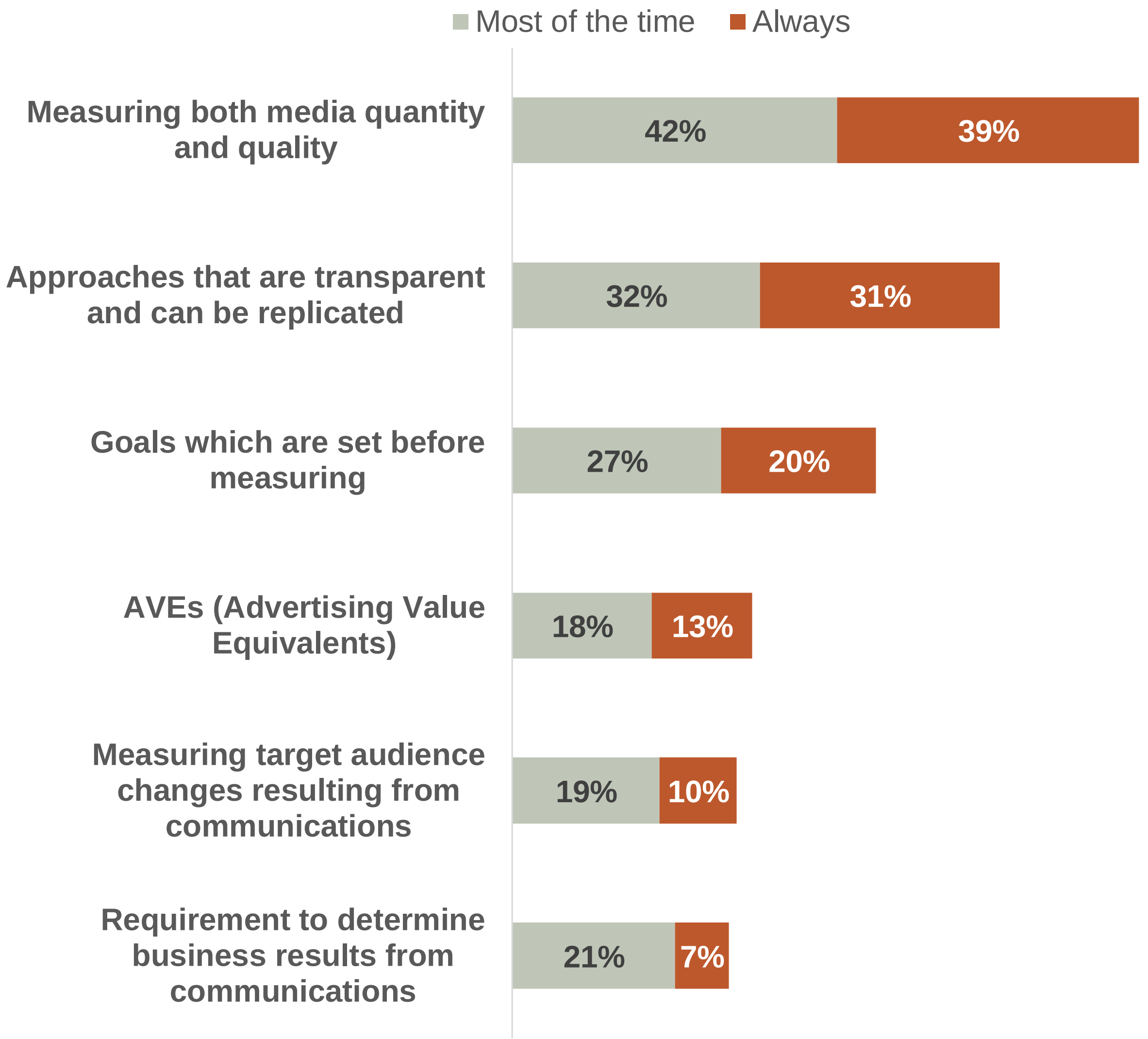
- AMEC members estimate that 29% of clients overall have increased their research and insight budgets in the past year. Meanwhile, 15% have decreased their research and insight budget over the same period
- In 2013, 26% increased their budgets while 21% decreased
- Budgets are most likely to have increased for clients of AMEC members working trans-nationally or located in North America, Latin America and Africa (see table below)

Region	% of clients increasing budget
Western Europe	24%
Central/Eastern Europe	13%
North America	37%
Asia Pacific	33%
Other (Latin America, Africa)	39%
Trans-national	37%

Base: All (72) Q Please complete this question by inserting the percentage of your clients who fall into each category.

3. Client expectations

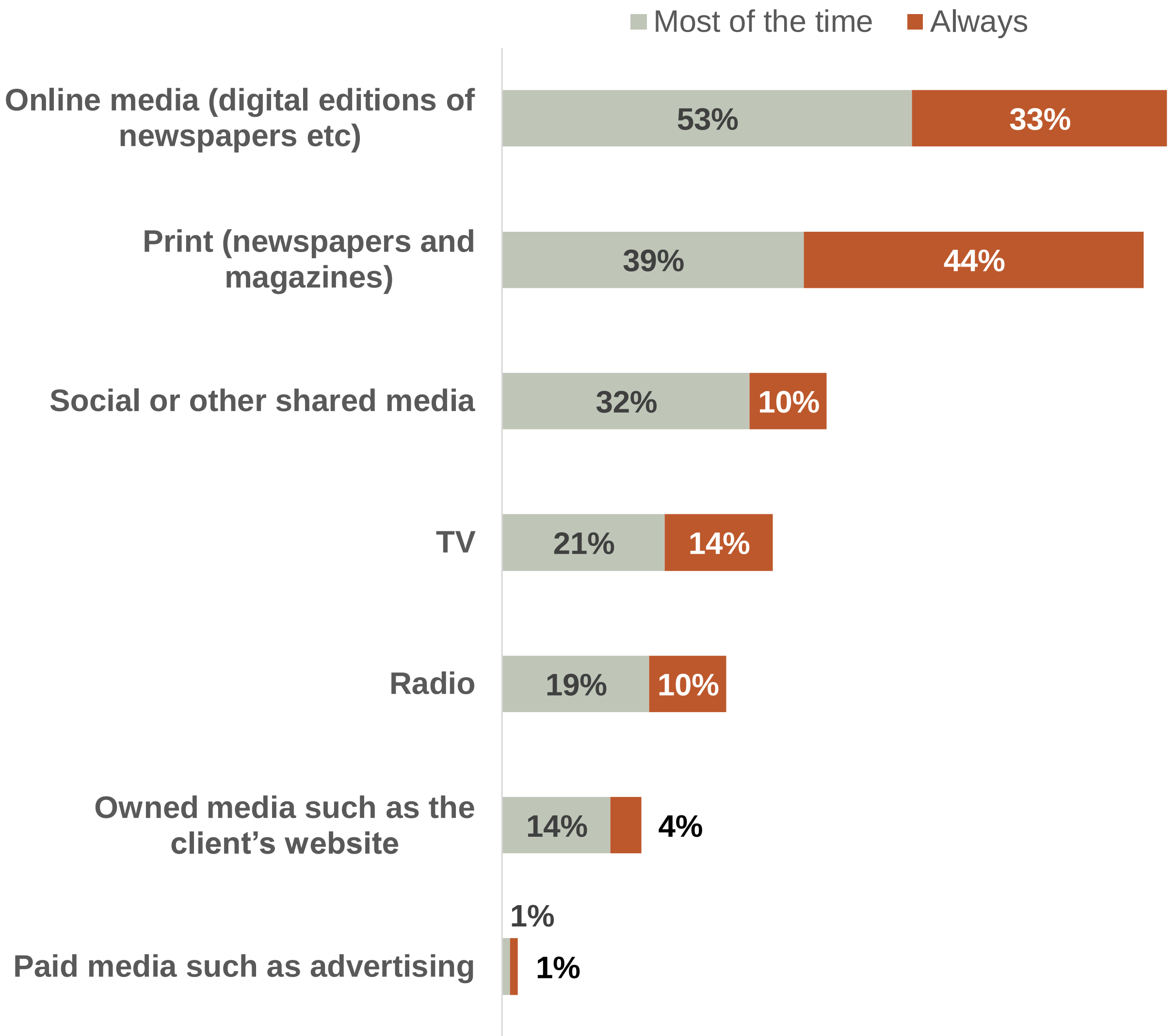
Client commissioned work



- Members were asked to indicate how often they are asked to incorporate a range of design aspects into client assignments
- More than eight in ten members are asked to measure both quantity and quality always/most of the time, and more than six in ten say clients usually want transparent approaches which can be replicated
- In 47% of cases, clients usually expect goals to be set before measurement
- More than three in ten continue to include AVEs in most of their work at the request of clients
- Measuring the impact of communications on the target audience and on business performance are only regular requirements for a minority of clients

Base: All (72) Q How often does measurement work commissioned by your clients incorporate the following?

Media channels

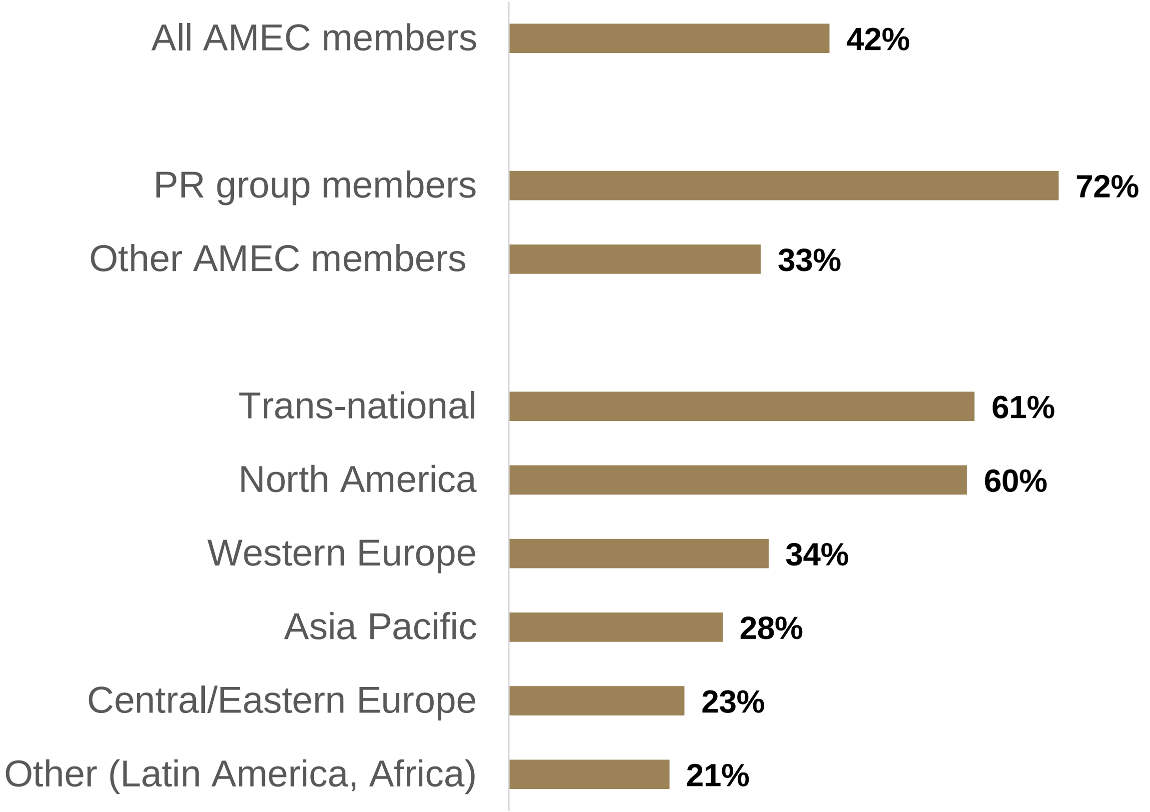


- The vast majority of client work includes online media (86%) and print media (83%) *always or most of the time*
- Social/other shared media is usually included by 42% of clients while TV (35%) and radio (29%) measurement are regular requirements for around one in three clients
- 18% of clients usually want owned media to be included
- Only 2% regularly want paid media such as advertising to be included in the scope of work commissioned. However, a further 22% say this happens *some of the time* and 47% say they are asked for this kind of measurement, but *only rarely*

Base: All (72) Q For each of the following media channels please indicate how frequently your clients include these in the scope of the work you carry out for them?

Social media measurement

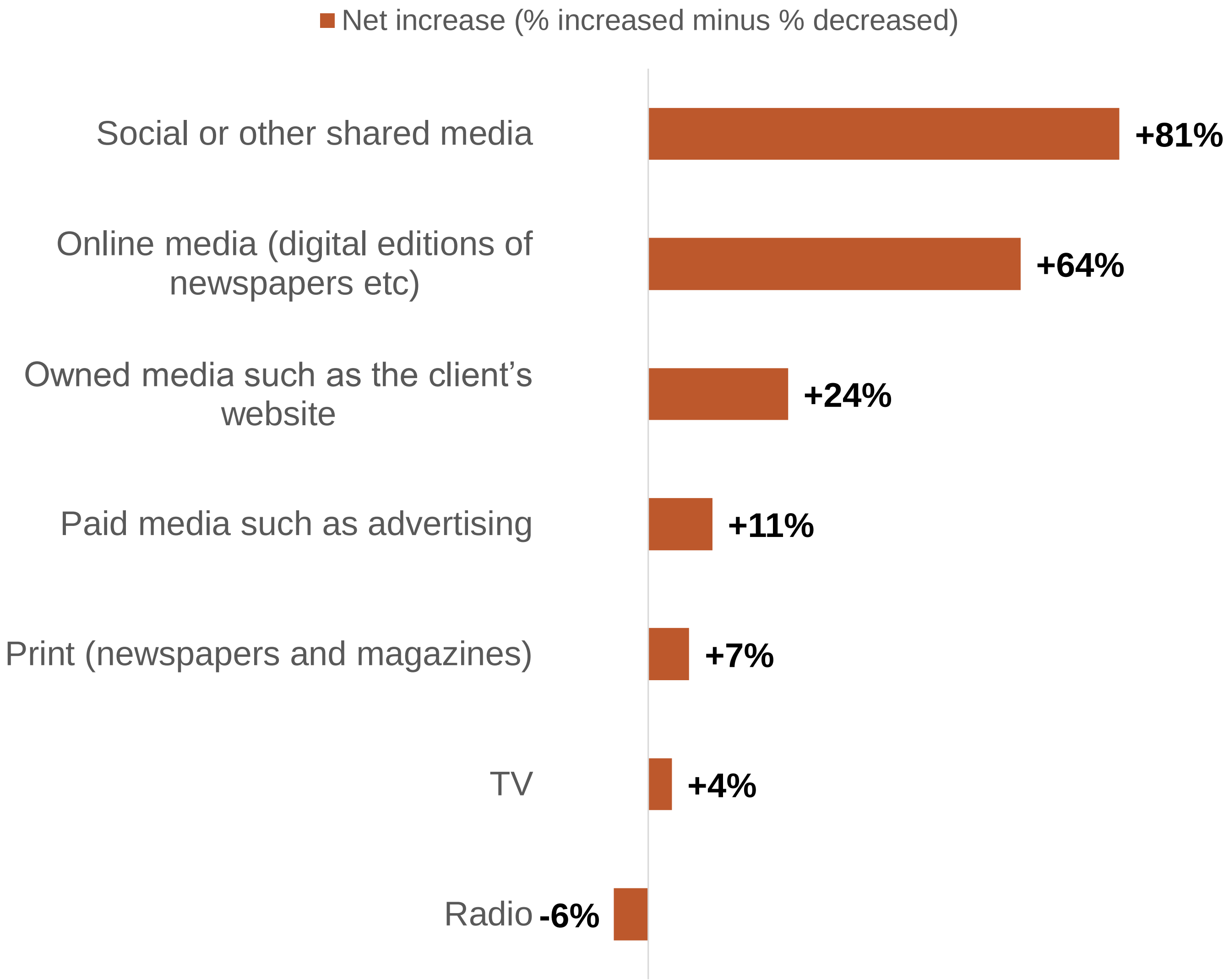
42% of clients included social media in their programmes in 2013



- In total, 42% of AMEC member clients included social media in their programmes during 2013, compared with 39% in 2012
- The extent to which social media is included varies widely across the industry
- AMEC members in the PR sector are far more likely to be asked to research social media than other types of member
- Social media research is most likely to be included in the remit for members working across continents and those based in North America
- Social media research is less common in the Latin America, Africa and Eastern European regions

Base: All (72) Q Thinking about all the research and insights work your business carried out for all types of clients in the year ending December 31st 2013, approximately what percentage of your total clients included social media in their programmes (including all user generated content sites)?

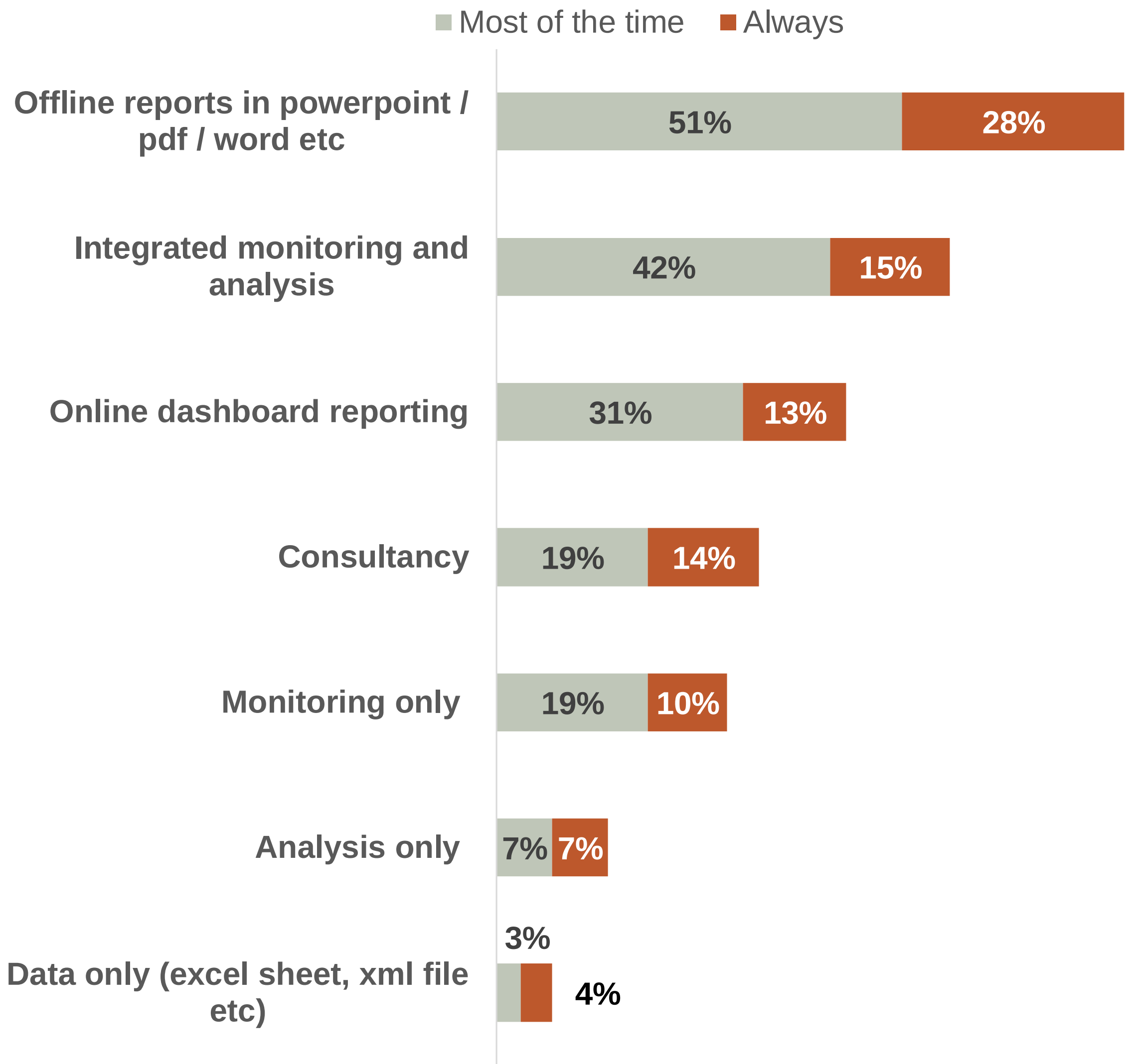
Change in client demand



- Members were asked to say if client demand for measurement of each channel has increased, stayed the same or decreased in the past 12 months. The figures in the chart are net scores – the proportion who have seen an increase minus the proportion reporting a decrease
- Client demand for measurement of social media and online media such as digital editions of newspapers has increased for most members (+81% and +64%, respectively)
- However, demand for TV and print measurement is comparatively flat, while demand for radio measurement is declining

Base: All (72) Q For each of the following media channels, please indicate how client demand for measurement has changed in the past 12 months.

Outputs

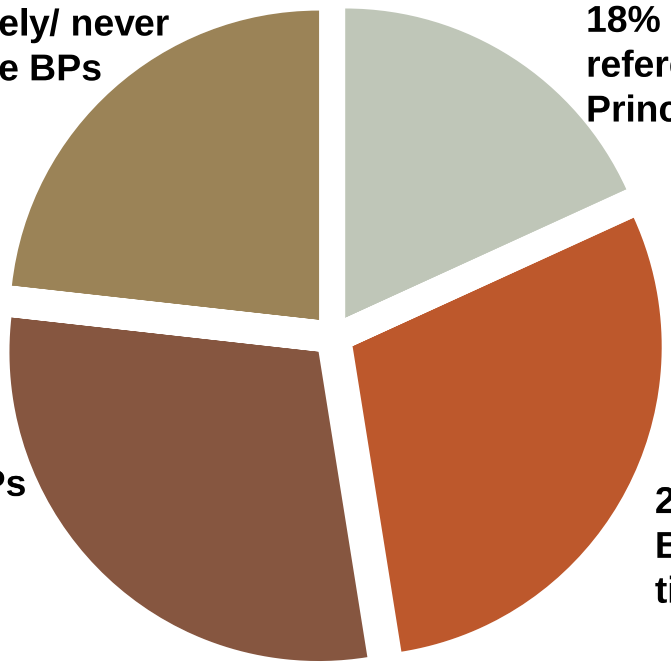


- Offline reports in powerpoint, excel, pdf etc continue to be the most common output type, with almost eight in ten members saying this is an element in client deliverables always/most of the time
- 57% usually provide integrated monitoring and analysis in their reporting, compared with 29% who regularly provide monitoring only and 14% who regularly provide analysis only
- More than two in five (44%) regularly make online dashboard reporting available to clients
- One in three regularly offers consultancy
- Data only is the least common output format

Base: All (72) Q Thinking about your service mix, how often do your clients receive the following types of output as part of the service provided by your organisation?

4. The role of AMEC

Barcelona Principles

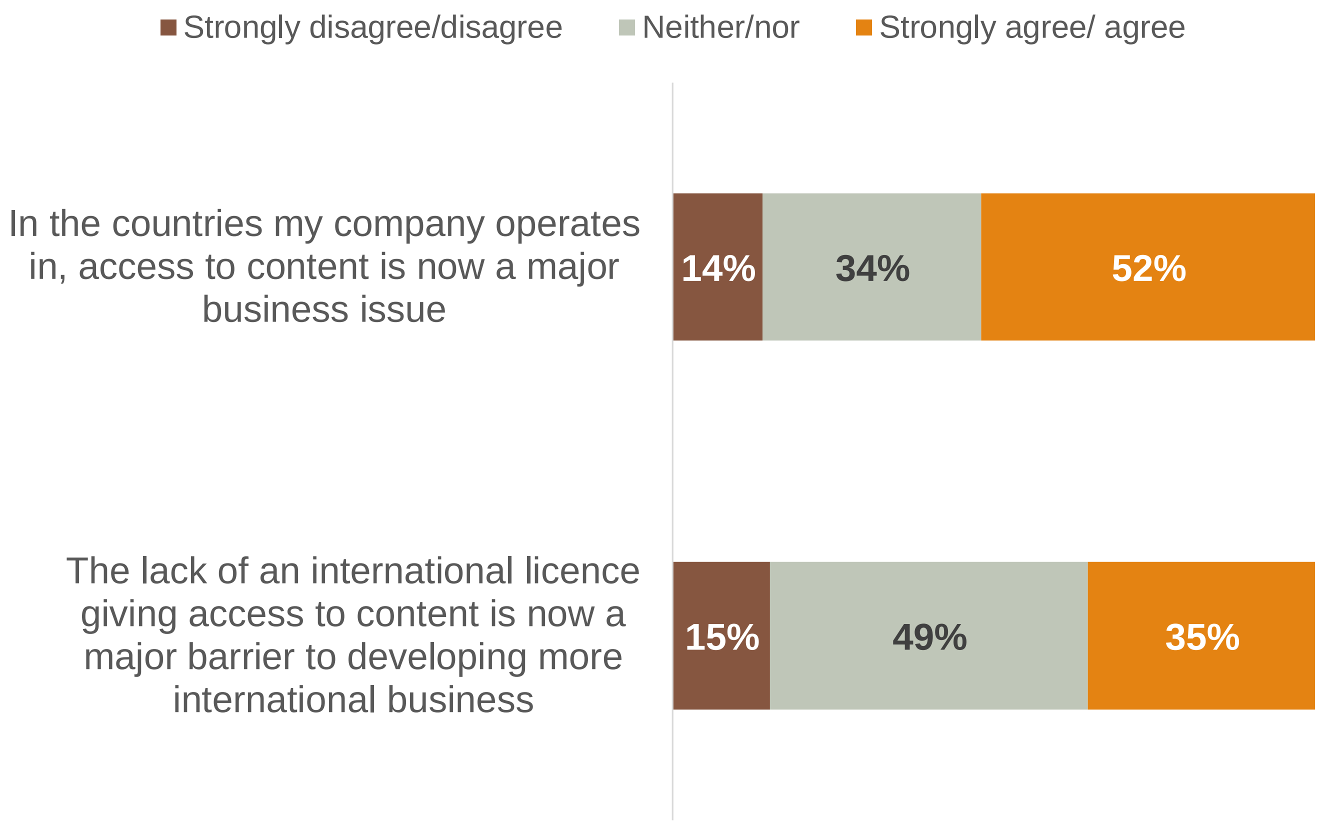


- Overall, 47% of members reference the Barcelona Principles always/most of the time in new business discussions/proposals for clients
- Meanwhile, 29% only make this reference some of the time and 8% rarely do so. 15% never reference the Barcelona Principles
- Amongst the 38 members who reference the Principles some of the time or less often, the most common reason is that they don't expect clients to understand/be interested (see table below)

Reasons for not referencing Barcelona Principles	(Base: 38 members)
Do not expect clients to understand/be interested	34%
Clients want to stick with use of AVEs	26%
Use own set of values instead of Barcelona Principles	21%
Do not understand Barcelona Principles clearly enough	11%
Barcelona Principles are about AVEs which is not relevant to our business	5%

Base: All (72) Q How frequently do you reference the AMEC Barcelona Principles in your new business discussions with/proposals for clients? Please indicate below why you do not reference the Barcelona Principles all/most of the time in your new business discussions with/proposals for clients?

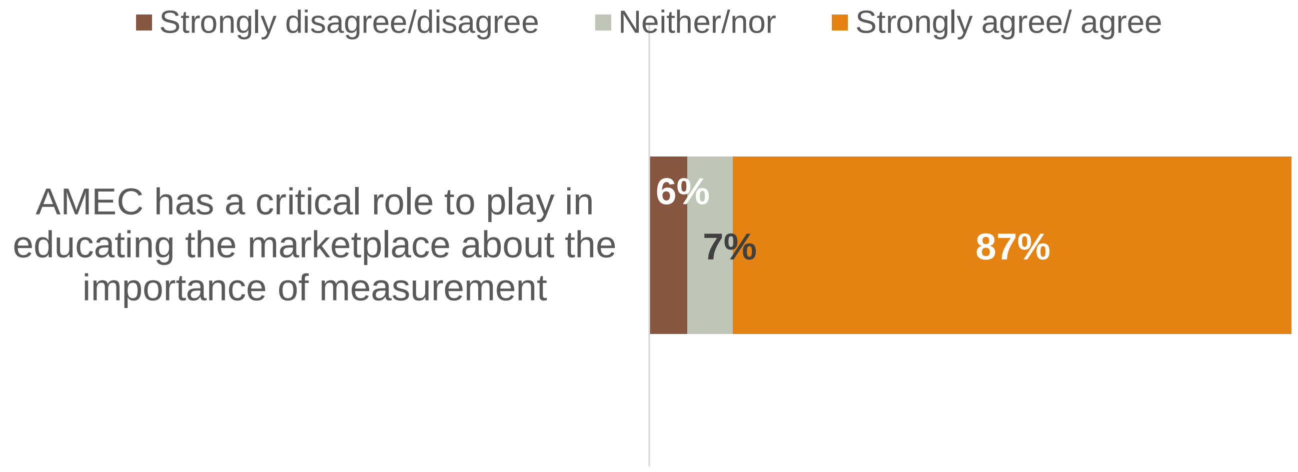
Content licencing

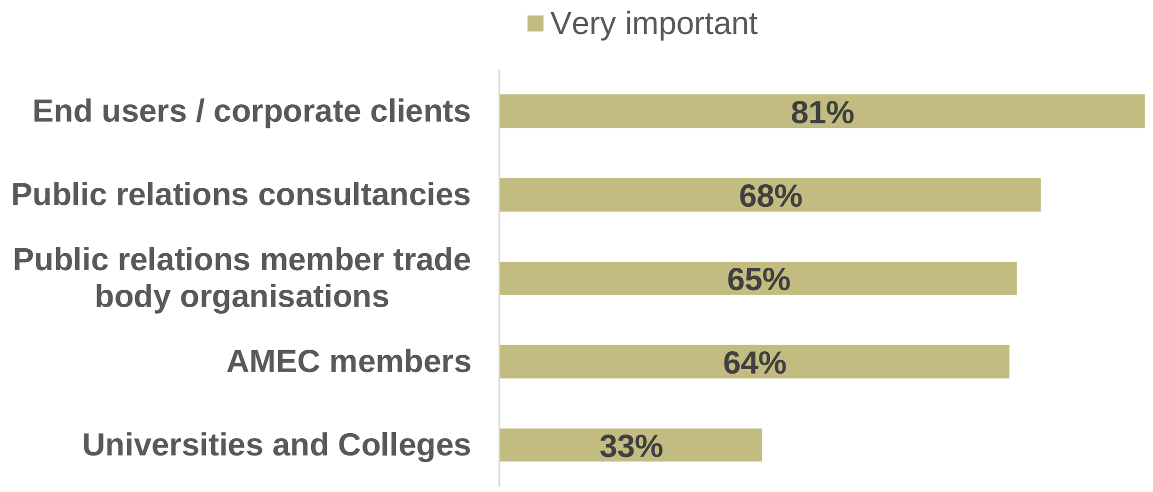


- More than half the members surveyed agree that access to content is a major business issue in the countries they operate in – the figure of 52% is unchanged when compared with 2013
- Opinion is less clear with regard to the impact of the lack of an international licence to access content. One in three (35%) agree that this is a barrier to developing more international business but 15% disagree and almost half have no strong feeling either way
- When compared with last year, the proportion agreeing that this is a major barrier rises slightly, from 27% to 35%

Base: All (72) Q Please indicate how much you agree or disagree with each statement

AMEC's Global Education Programme

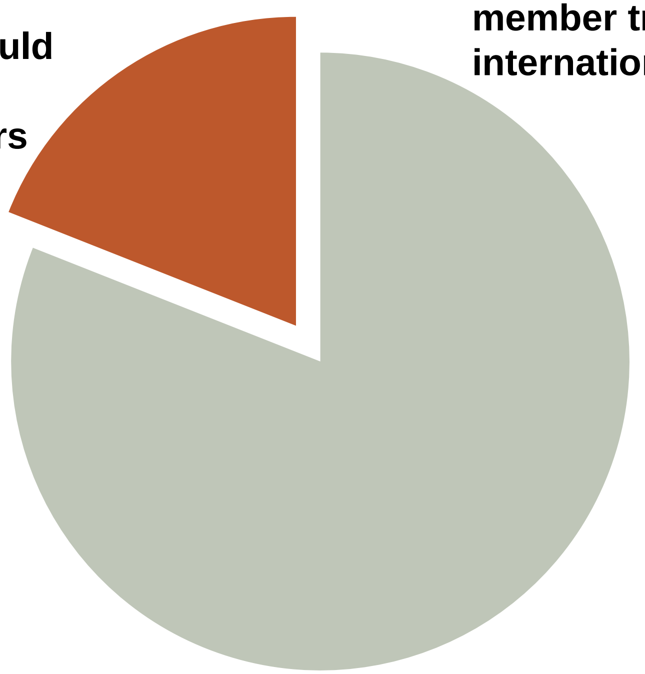




- A vast majority of members believe that AMEC has a critical role to play in educating the marketplace about the importance of measurement
- Many members feel that all or most of the audiences listed have a very important role in fostering the greater adoption of measurement and analytics, as part of AMEC's Global Education Programme
- End users / corporate clients are rated the most important, followed by PR consultancies, PR trade bodies and AMEC members
- Comparatively, universities and colleges are not felt to be as important as these other audiences

Base: All (72) Q Please indicate how much you agree or disagree with each statement. How important are each of the following audiences the greater adoption of measurement and analytics, as part of AMEC's Global Education Programme?

AMEC's strategic partnerships with PR bodies



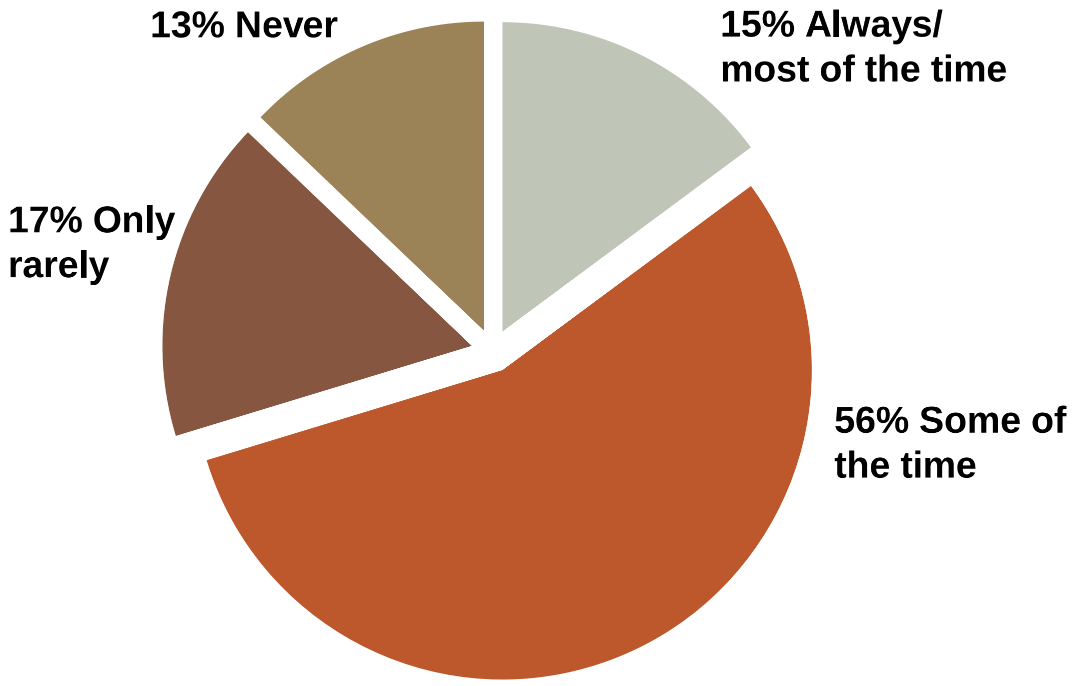
- Most AMEC members would like AMEC to do more to align with more PR member trade bodies internationally instead of working only with existing partners – PRSA, ICCO and PRCA
- Members would most like to ask leaders at the Amsterdam Summit: *"What can you do more of within your company to make measurement and analytics a "must-have" of every PR programme and campaign?"* (see table below)

Question preferences (multiple answers allowed)	
What can you do more of within your company to make measurement and analytics a "must-have" of every PR programme and campaign?	57%
Do you think the main barrier to a wider use of measurement and analytics in PR has been the reluctance of end clients to see its value?	39%
Or has the main barrier been the ambivalence of PR professionals towards measurement?	40%
Other	18%

Base: All (72) Q AMEC is currently a Strategic Partner of PRSA, ICCO and PRCA. Which of the following courses of action do you think AMEC should follow? AMEC has a session at this year's AMEC Summit involving three global PR leaders. Which of the following questions would you most like to ask these leaders?

5. Industry partnerships

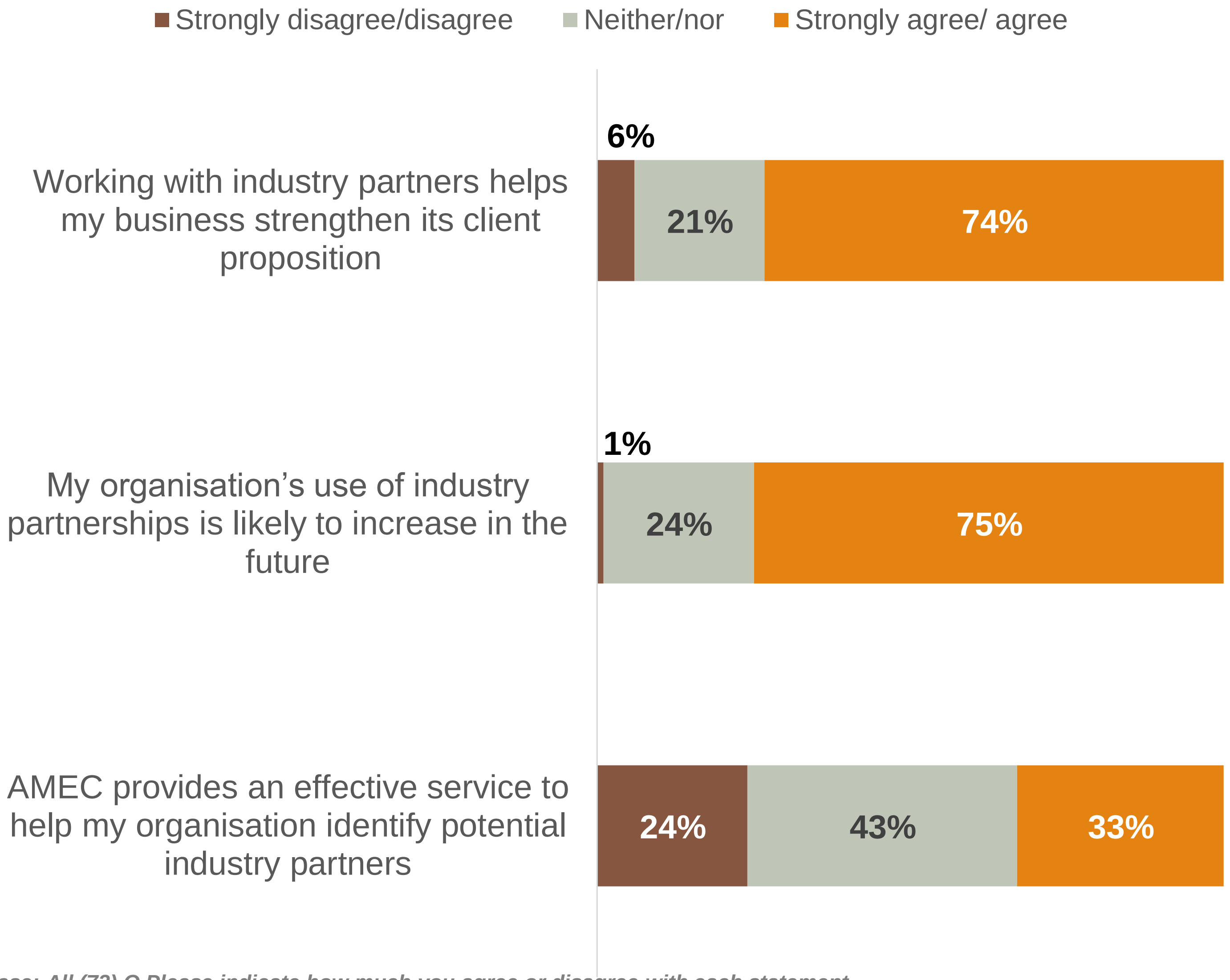
Partnership working - 1



- Members were asked about the increasing trend for measurement and evaluation providers to work in partnership with other firms in the industry to provide a broader client service, for example to encompass measurement from an additional region or channel into the scope of the work
- Only a small proportion (15%) say they *always* or *mostly* work in this way already, but 56% work in partnerships like this *some of the time*
- In total, three in ten only work in this way *rarely* or *never* do so

Base: All (72) Q There is an increasing trend for AMEC measurement and evaluation firms to seek partnerships with other firms in the industry in order to fully deliver the service required by clients. For example, a partner may provide data from another global region or data from another media channel to enhance the overall client deliverable. How frequently does your organisation work in this kind of partnership?

Partnership working - 2

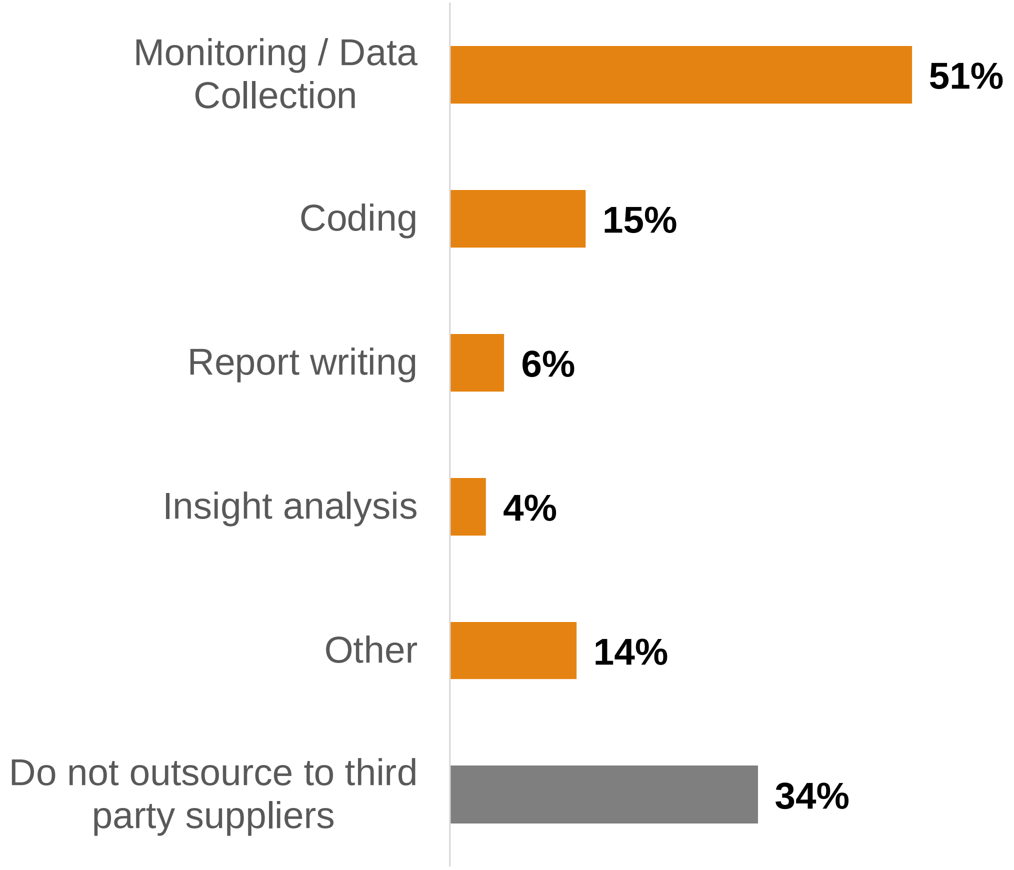


- Three in four members think that working in industry partnerships helps to strengthen their business proposition for clients
- Working in partnerships of this kind is expected to increase in future by most AMEC members
- Opinion is divided on the support AMEC gives to those members seeking out potential partners. One in three says AMEC is effective in this role, but 24% disagree that this is the case

Base: All (72) Q Please indicate how much you agree or disagree with each statement

6. Suppliers

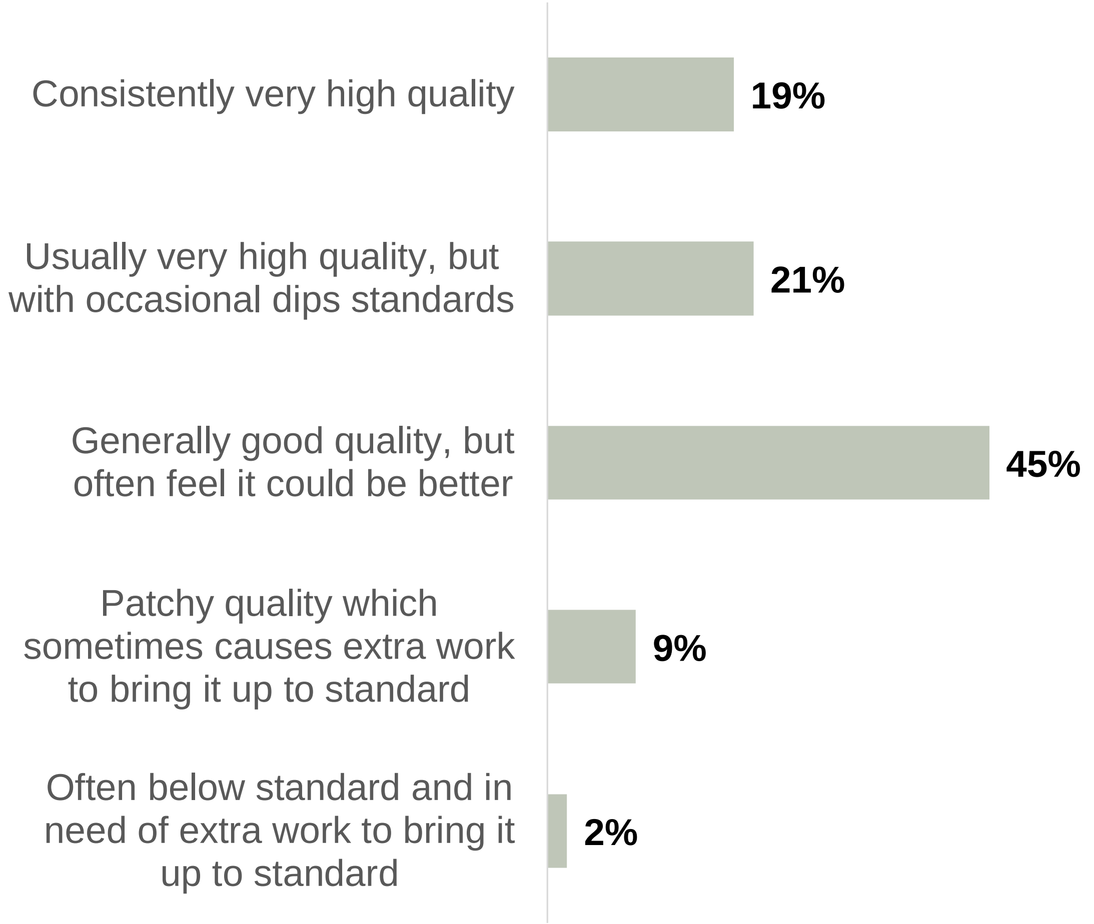
Use of outsourcing



- Two in three AMEC members (66%) use outsourced suppliers for at least one aspect of client work
- The majority (51%) outsource some aspect(s) of monitoring and data collection
- Coding is outsourced by 15% of members, with 6% outsourcing report writing and 4% insight analysis
- Outsourcing is most common in Western Europe (86% outsource in at least one area) and among trans-national firms (82%)
- Asia Pacific members use outsourcing less frequently (37%), as do members in Latin America/ Africa (25%) and in Central/Eastern Europe (44%)

Base: All (72) Q Does your company currently outsource the following to third party suppliers?

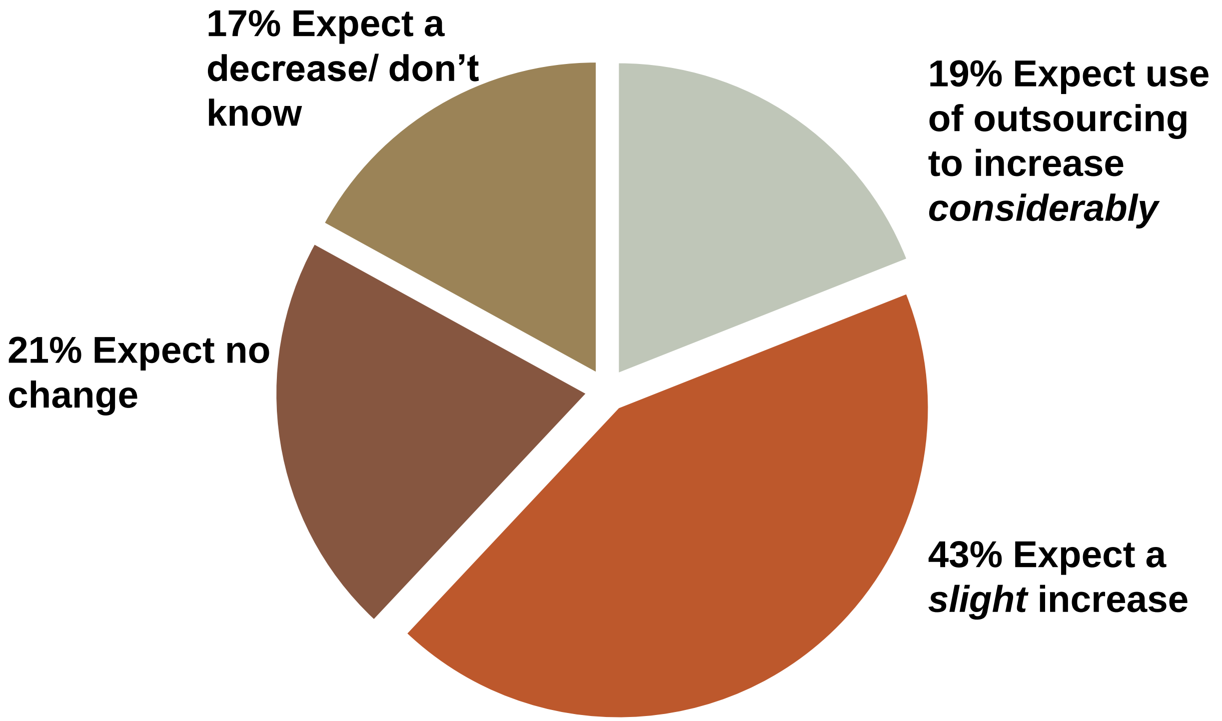
Assessment of outsourcing quality



- Only one in five members who use outsourced suppliers say the work is consistently of a very high quality, and a further 21% say it is usually very high quality with occasional dips
- 45% think the quality of outsourced work is generally good but could be improved
- One in ten find the quality of outsourced work is often patchy, including 2% who say it is regularly below standard and in need of extra work to bring it up to scratch

Base: All who outsource at least one aspect of work (47) Q Overall, how would you describe the quality of the work carried out for your firm by suppliers of this kind of service?

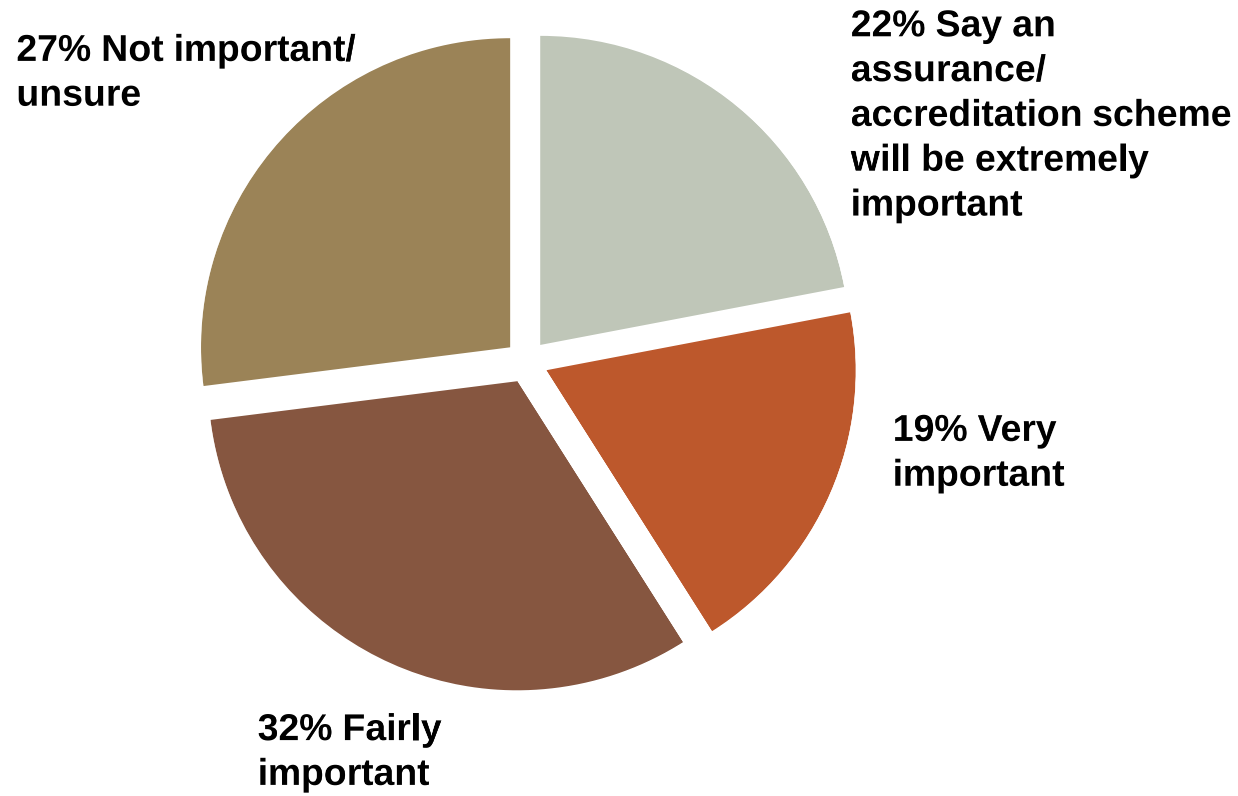
Future use of outsourcing



- Most AMEC members expect their use of outsourcing to grow in the next year or two
- 19% forecast a considerable increase and 43% say they expect a slight increase
- Only 17% expect their use of outsourced suppliers to decrease or are unsure about how usage will change

Base: All (72) How is your level of usage of third party suppliers likely to change in the next year or two?

Importance of quality assurance

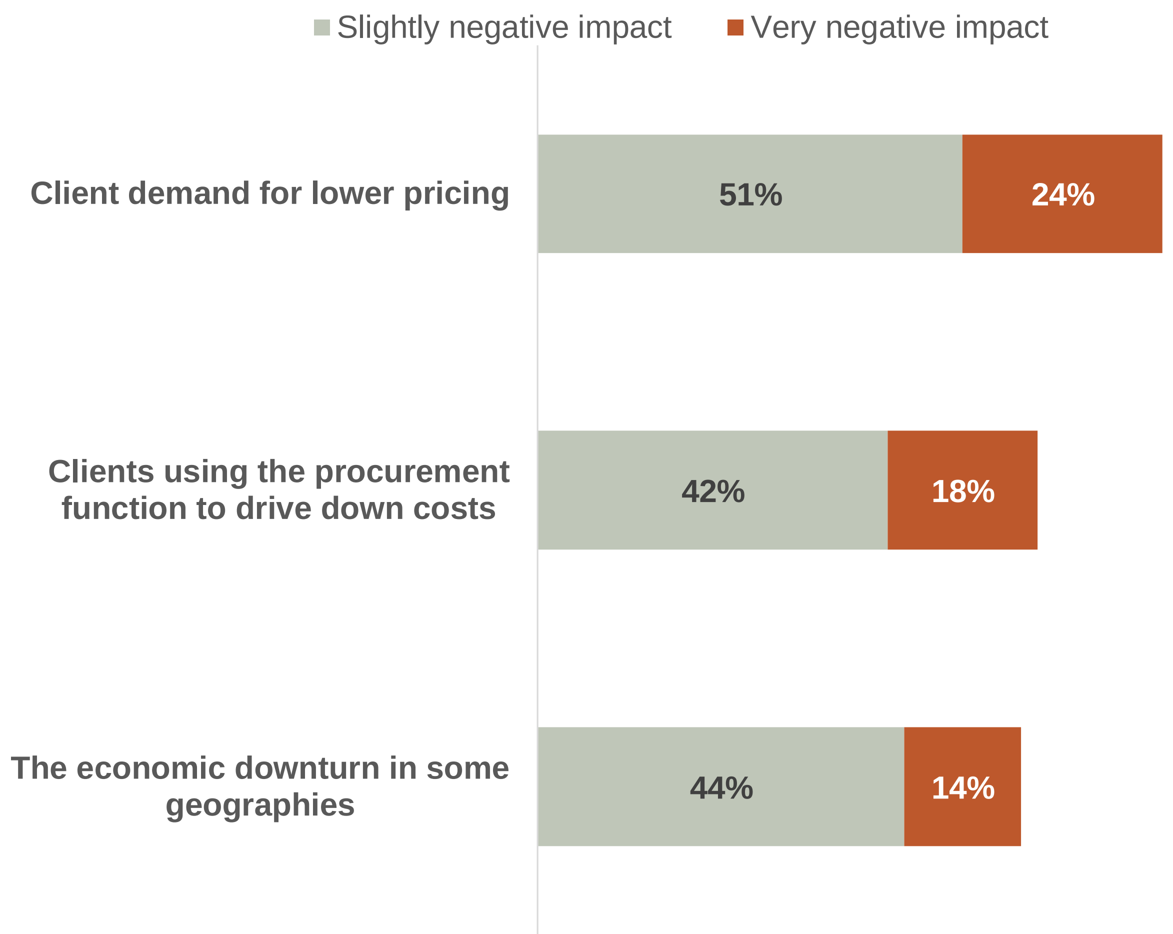


- More than four in ten members say that it is *extremely/very important* for AMEC to take forwards an initiative to develop a quality assurance/accreditation scheme for members and outsourced suppliers
- A further 32% say they think this is *fairly* important
- However, one in four members believes this is *not important* (or don't express a view either way)

Base: All (72) AMEC is considering the development of a quality assurance/accreditation scheme for members and outsourced suppliers. How important to do feel it is for AMEC to take this initiative forwards?

7. Business growth

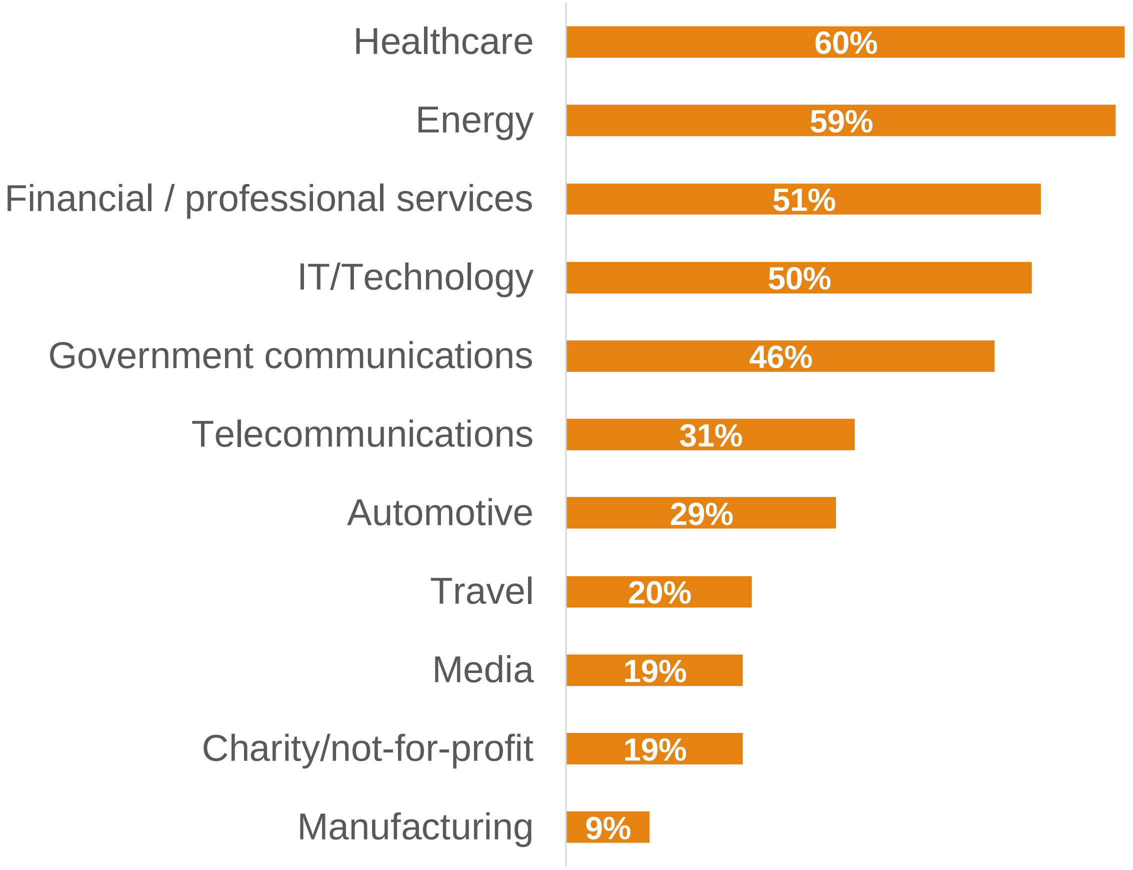
Factors inhibiting business growth



- Client demand for lower pricing is the main factor which has a negative impact on AMEC members' ability to grow – 24% say this has a *very negative* impact and 51% say it is *slightly negative*
- The total seeing a negative impact cause by client pricing demands is up from 62% in 2013 to 75% this year
- 18% of members say the impact of client procurement is very negative, with 42% saying this has a slightly negative effect
- A total of 58% report some negative impact on capacity to grow from weaker economic activity in some regions
    - The proportion is very similar to 2013 (59%)

Base: All (72) Q Please indicate whether these are having a positive or negative impact on your ability to grow your business.

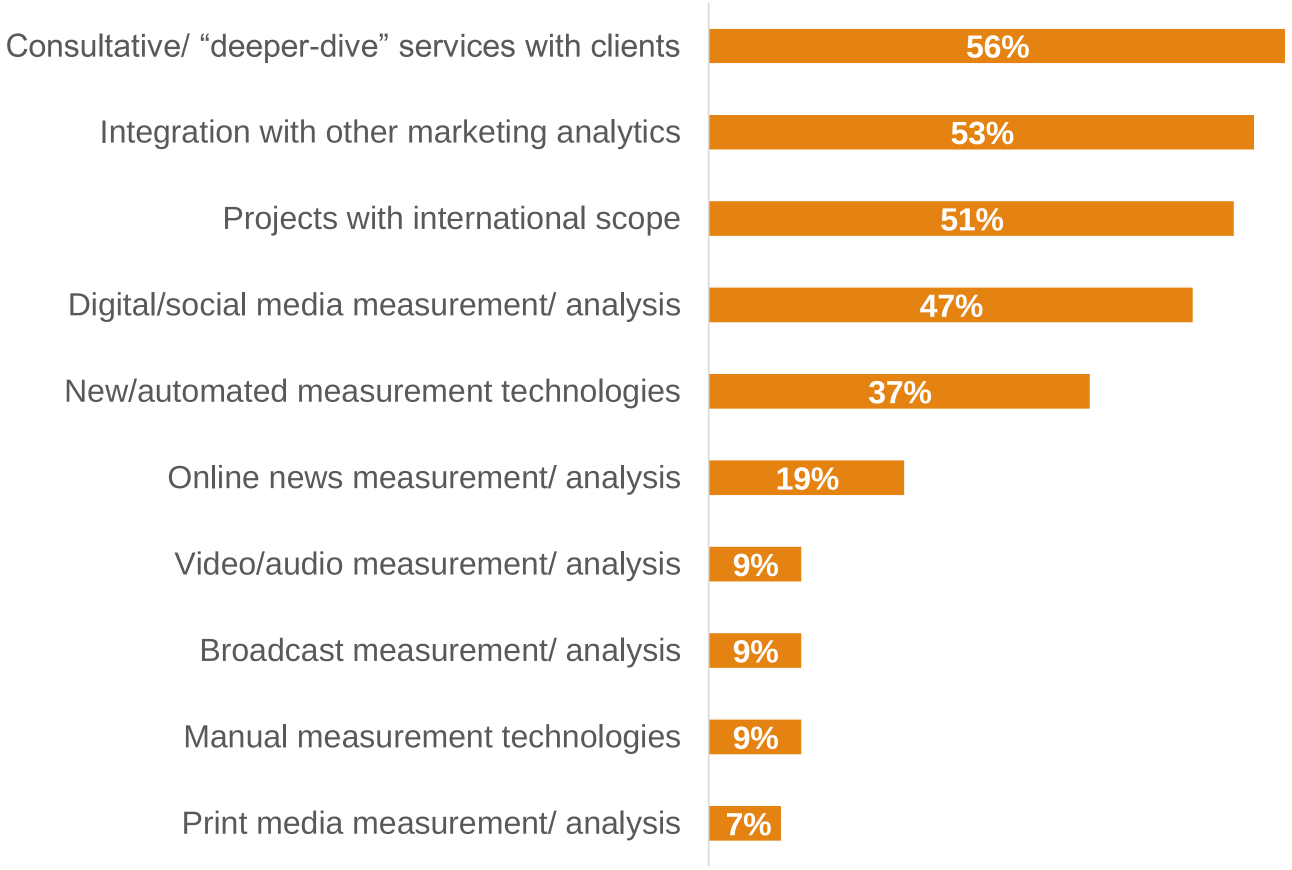
Potential growth sectors



- Members see most potential for growth in the healthcare business sector looking forward over the next year, followed closely by the energy sector
- Around half expect solid growth potential in the financial / professional services and IT / technology sectors
- Sectors with the greatest potential vary by region:
    - Western, Central & Eastern Europe: **Energy**
    - North America: **Healthcare**
    - Asia Pacific: **Financial & Professional Services** and **Government Communications**
    - Trans-national: **Healthcare**

Base: All (72) Q Which client sectors do you think have the biggest industry-wide potential for growth during the next 12 months?

Potential growth activities



- As in 2013, members believe the greatest potential growth driver is offering more *consultative services, with “deeper dive”* into what the data is saying (56% select this as one of their top three)
- Significant potential is also recognised in opportunities for *integration with other marketing analytics* (53%) and *international* work (51%)
- 47% expect *digital/social media measurement and analysis* to continue to offer growth potential
- More than one in three (37%) see strong potential in *new measurement technologies*

Base: All (72) Q Which three areas of business activity offer the greatest potential to drive business growth during the next 12 months?

8. Benchmarking

Benchmarking

- This section includes questions on business metrics and performance which have been asked each year since the benchmarking survey began in 2008

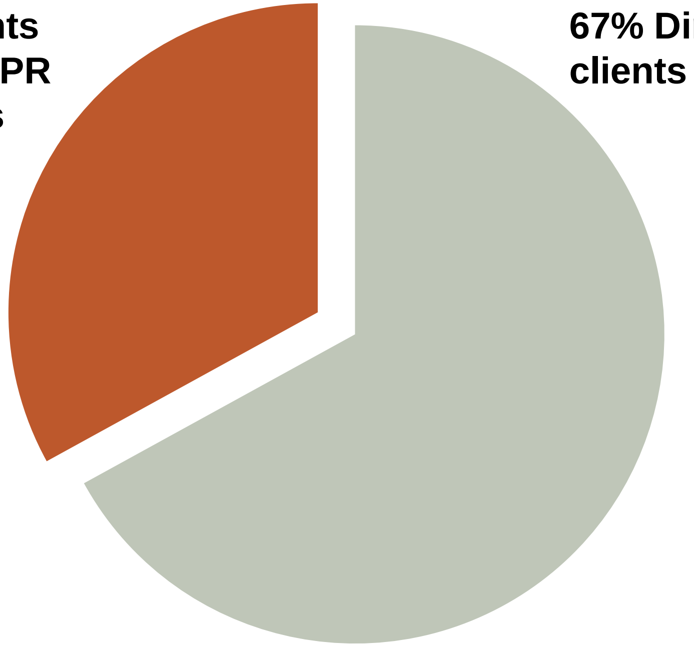
- Members could choose to opt out of the financial benchmarking questions to avoid conflict with Sarbanes-Oxley
    - These questions were also left blank by a number of other participating members
    - In total, 38 of the 72 participating member companies provided financial information (53%)

- In the early years of the survey the set of members completing these questions remained relatively consistent and evolved slowly over time, making year-over-year comparison relatively straightforward

- However since 2013 the set of members has evolved quite rapidly:
    - More PR consultancies participating
    - M&A activity within the industry
    - New members contributing figures for the first time

- Consequently, we need to be more cautious drawing year-over-year comparisons

Direct vs PR originated clients

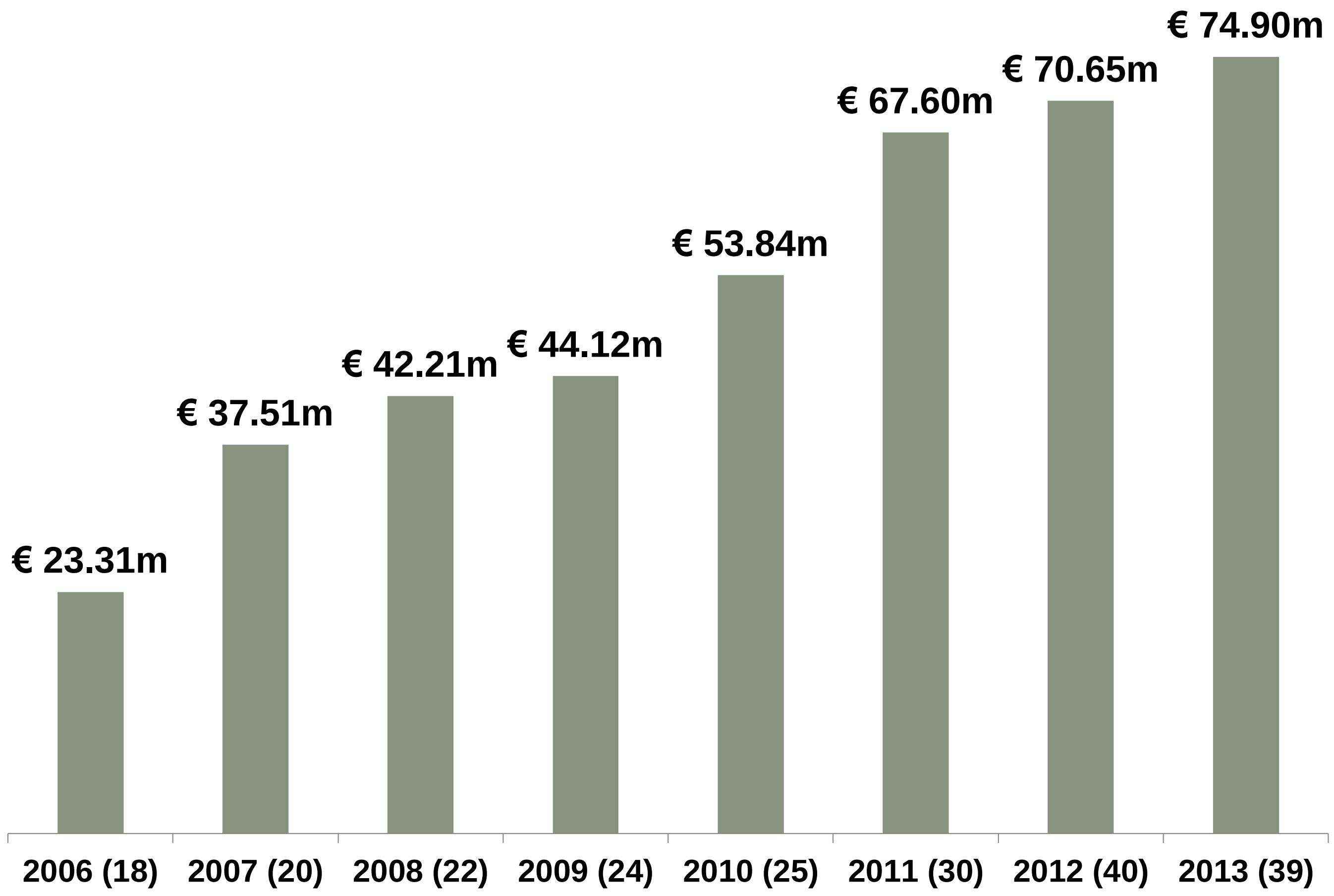


- AMEC members taking part in the 2014 survey report a total of c22,500 end clients, one third of which are originated through PR consultancies
- The remaining 67% are direct end clients
- Figures are similar to 2013, when 66% were direct end clients and 34% originated via a PR consultancy
- The table below shows how the spread between the two categories is somewhat different for members based primarily in North America when compared to other regions

	% Direct end clients	% Via PR consultancy
Western Europe	77%	23%
Eastern Europe	80%	20%
Asia Pacific	76%	24%
Trans-national	77%	23%
North America	46%	54%

Base: All (72) Q Thinking now about the research and insights business you carried out in year ending December 31st 2013, please write in below the number of clients you have in each category?

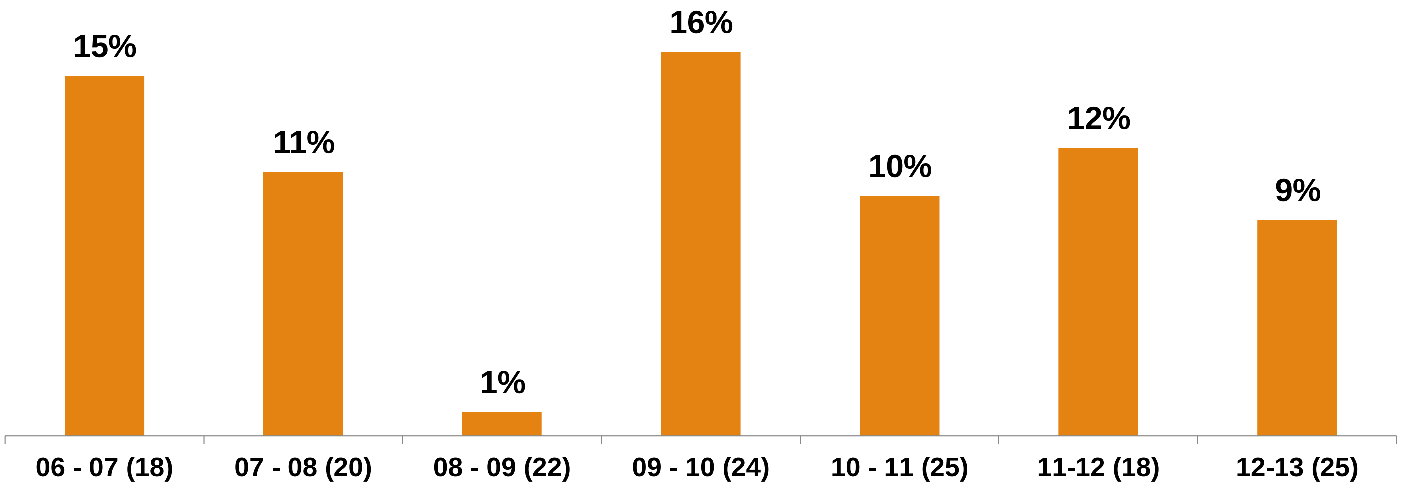
Overall revenue



- The total income reported by the 38 AMEC members answering this question is €74.9 million
- This continues to reflect year-over-year growth, as has been the case every year since the survey started
- However, it should be emphasised that these figures do not necessarily include the same basket of AMEC members each year
- Also, please note that 34 AMEC members taking part in the survey did not provide figures

Base: All members providing income figures (38) Q Please write in below the total value of all research and insights business undertaken by your organisation, across all your sites, in the year ending 31 December 2013

Growth over time



- This chart shows the average year-over-year growth in income from research and insights work across AMEC membership as a whole (where data is available)
- The average increase for each period is calculated only on the basis of member companies who provide data for both time periods in the equation (e.g. reported figures in both 2013 and 2014 surveys). The number of member companies in each annual calculation are shown in brackets
- In the 2012-13 period, income across 25 members companies reporting for both years is 9% higher year-over-year

Base: All members providing income figures for both years in the calculation – base sizes in brackets. Q Please write in below the total value of all research and insights business undertaken by your organisation, across all your sites, in the year ending 31 December 2013

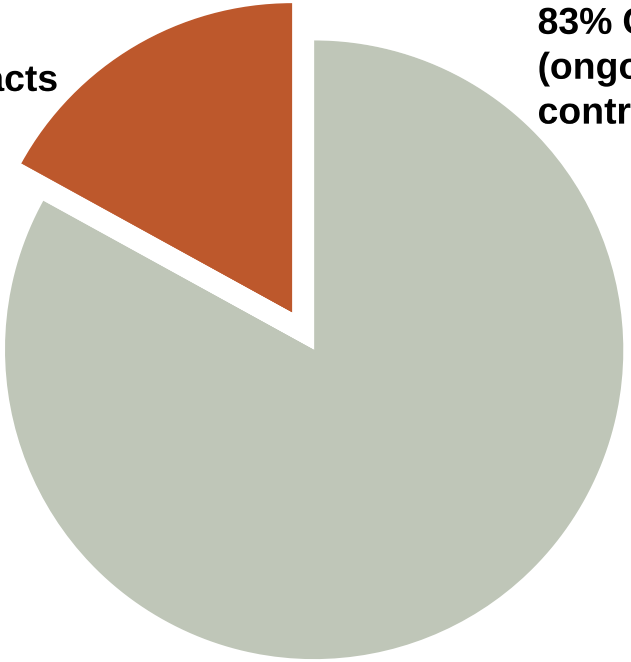
Growth over time – by business size

- The table below shows annual growth in each of the three size categories
- Between 2012 and 2013, growth was strongest in the medium and large categories, but below average in the small size band

Growth period	06-07	07-08	08-09	09-10	10-11	11-12	12-13
Larger (more than €2m)	19%	9%	-1%	19%	10%	11%	**8%**
Mid-sized (€751K-€2m)	22%	20%	7%	10%	9%	16%	**12%**
Smaller (up to €750K)	32%	17%	-2%	3%	11%	12%	**5%**

Base: All members providing income figures for both years in the calculation. Q Please write in below the total value of all research and insights business undertaken by your organisation, across all your sites, in the year ending 31 December 2013

Continuous vs ad hoc work

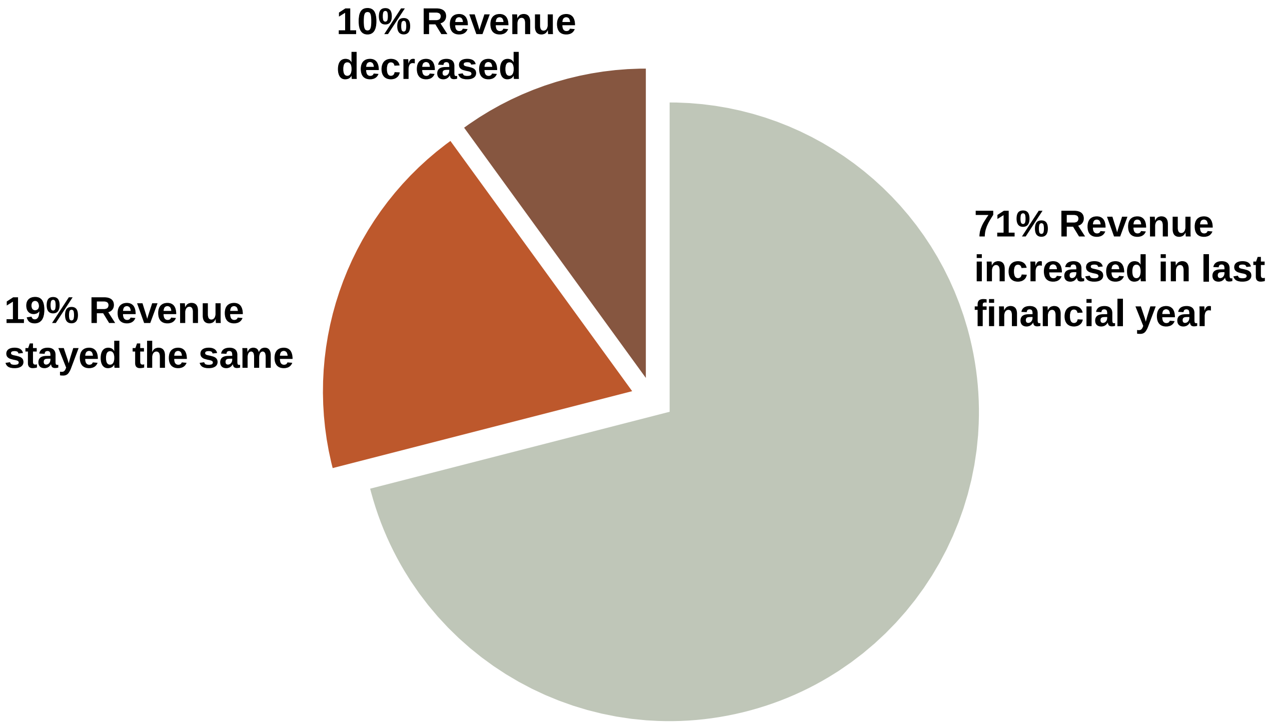


- In total, 83% of business commissioned by AMEC members reporting figures for 2013 is classified as continuous work, with the remaining 17% classified as ad hoc
- The proportion of continuous work is slightly higher than was the case in the figures for 2012 (see table below)

Survey year	2008	2009	2010	2011	2012	2013
Continuous	81%	81%	80%	84%	80%	83%
Ad hoc	19%	19%	20%	16%	20%	17%

Base: All members providing income figures (38) Q Please indicate the value of all research and insights business undertaken in 2013 as continuous work? By continuous work, we mean ongoing renewable contracts. Q And now please indicate the value of all research and insights business undertaken in 2013 as ad hoc projects? By ad hoc projects we mean contracts with a fixed end date.

Revenue growth



- As with other questions about financial performance, members were able to opt out of answering this overall question about revenue change, resulting in a lower base size of 41
- In total, 71% of those answering say their company's total revenue increased in 2013
- 19% say revenue was unchanged and 10% report a decline in revenue
- In 2013, 74% reported increased revenues and 6% reported declines

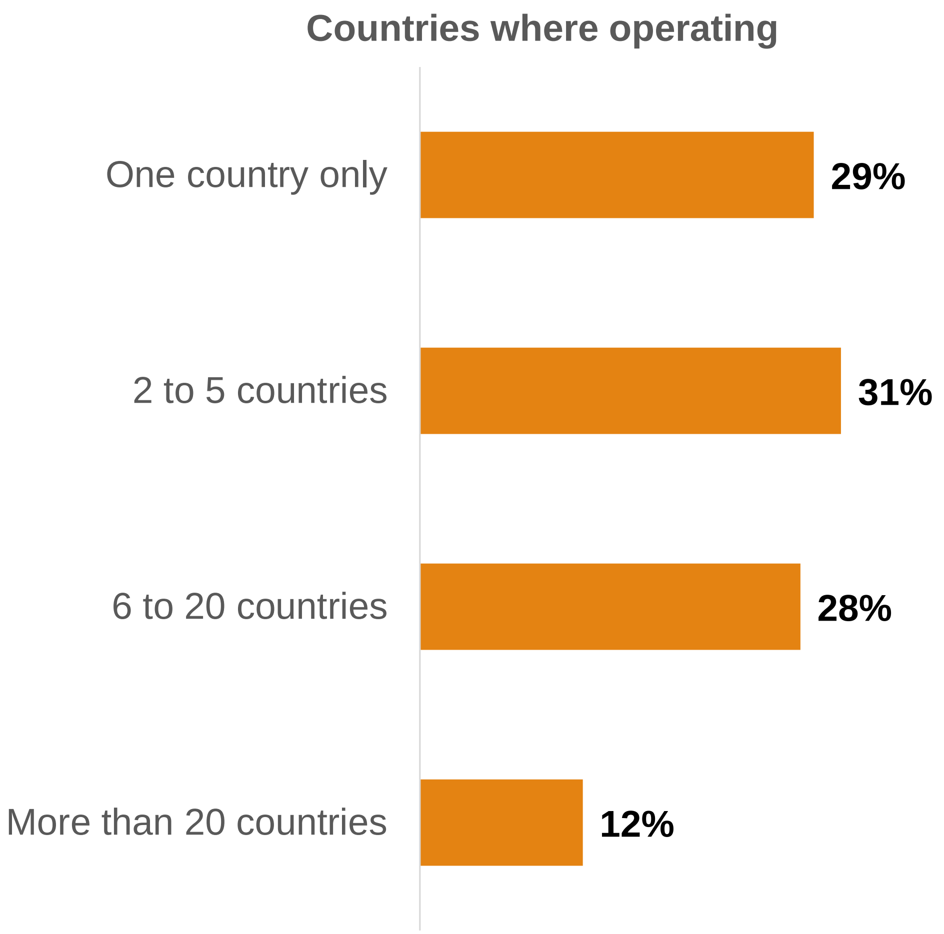
Base: All answering (41) Q For the last financial year (i.e. the year to December 2013 or your financial year as applicable), did your company's total revenue increase, decrease or stay the same compared with the previous financial year?

Payroll size

- In total, 64 AMEC members answering the question employed 3,614 full-time equivalent payroll employees on research and insights business on December 31st 2013
- More than a third of these employees are based in Western Europe
- One in five (21%) work for trans-national employers, 14% are based in Central/Eastern Europe and one in ten is based in North America
- One in three AMEC members employ fewer than 10 full-time equivalent staff, while 40% have 10-50 staff
- 27% have more than 50 full-time equivalent employees

Base: All answering (64) Q Please indicate the number of full-time equivalent payroll employees working on research and insights business in your organisation (including all sites), as at 31 December 2013

Operational locations



- Overall, 29% of AMEC members answering the question only have operations in one country while 31% are based in 2-5
- Four in ten have operations in more than five countries: 28% in 6 to 20 and 12% in more than 20
- The 2014 survey reflects a more trans-national membership: the proportion operating in more than five countries is up from 31% in 2013 to 40% this year

Base: All answering (65) Overall, in how many countries does your organisation currently have operations?

For further information on the survey:

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