



2020 Survey Report

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This report

This report on the AMEC Global Membership Survey 2020 reviews the findings of the annual industry survey for the world's biggest measurement and insights trade body – AMEC.

The 2020 survey takes place against the background of the exceptional circumstances of the COVID-19 outbreak, and some survey findings reflect the impact of the global health emergency and subsequent economic shut down in many nations.

The online survey is designed for MD/CEO level participants and all current AMEC members are invited to participate:

- 144 AMEC members were invited to take part, covering all membership categories
- 69 completed surveys were received – a response rate of 48%
- Research was carried out between 24th April and 11th May 2020

The survey data has been analysed to look at specific groups within the overall population of AMEC members – defined by organisation size, type of business and the regions in which the organisation undertakes measurement, evaluation and insights work:

- Throughout the analysis process we have looked at how the findings vary across these different categories, but this comparison is only discussed and/or illustrated in the report where it shows an informative contrast between different groups
- Comparison between sub-groups should be interpreted as an illustration of differences in emphasis and experience between different categories of member, but cannot be said to be statistically significant, owing to the small numbers involved

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, b) exclusion of “don't know” and/or blank answers from the display on the chart or c) the question allows multiple answers
- Base sizes can vary between questions as some questions were left blank by some participants

Key point summary

Key point summary

The 2020 AMEC Global Membership Survey takes place against the unprecedented backdrop of the COVID-19 pandemic

- More than two in five AMEC members say some or all of their business has been halted as a result of the emergency
- And most have faced disruption to normal business activity, particularly new business development and office-based working patterns

The survey findings foreshadow a tougher business environment in the coming year

- Members believe 2019-2020 was another year of strong growth for the industry, but report mixed expectations for growth in the next 12 months
- Growth in the volume of new clients and new RFPs/tenders has slowed sharply in comparison with data from the 2019 survey
- While the majority of members have increased their investment in innovation this year, the proportion doing so is the lowest in five years

Elsewhere in the survey, members show that they are well-placed to take advantage of growth opportunities, despite the tougher economic climate

- Business development activity is focussing increasingly on consultative and professional services, mirroring a perceived growth in client demand for greater sophistication and more high-end consultancy
- Incorporation of AI solutions into measurement, evaluation and insights business continues to become more widespread across the membership

Profile of members surveyed

Business type

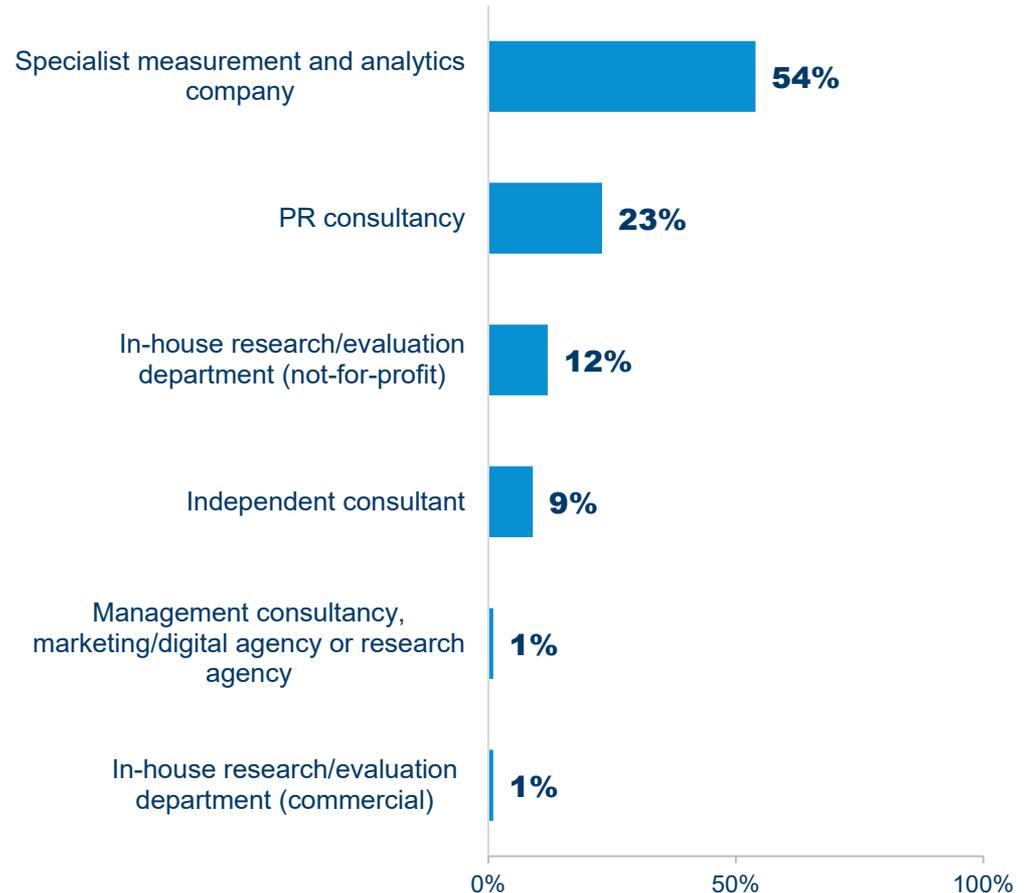
The survey asks a number of questions which are used to categorise participants by their type of business and scope of operations. The first of these identifies different business types within the membership overall.

The most common category of membership is the **specialist measurement and analytics company**, making up 54% of the sample in 2020. The proportion is similar to the 2019 survey figure (58%).

The second large group of members participating in the survey is **PR consultancies** – 23% in 2020, compared with 19% last year.

The remainder of the members taking part in the survey are split between the In-house and consultancy categories. **In-house research and evaluation departments** make up a total of 13% - 12% in not-for-profit organisations and 1% in commercial organisations. A total of 10% are **Consultants** – 9% in the independent consultant category and 1% in the management consultant, marketing or research agency category. The size of both categories are similar to 2019.

Later in this report, some charts contrast differences between the views of measurement and analytics members, PR members and members in in-house roles (including both NFP and commercial). The base size is too small to analyse consultants separately.



Q Please indicate which of these categories best describes your organisation
Base: All members

Revenue from measurement, evaluation & insights

There are two measures in the survey which identify the size of the organisations taking part. The first of these is annual revenue from measurement, evaluation and insights business in US Dollars. This question is only asked in the measurement, consultancy and PR categories of membership.

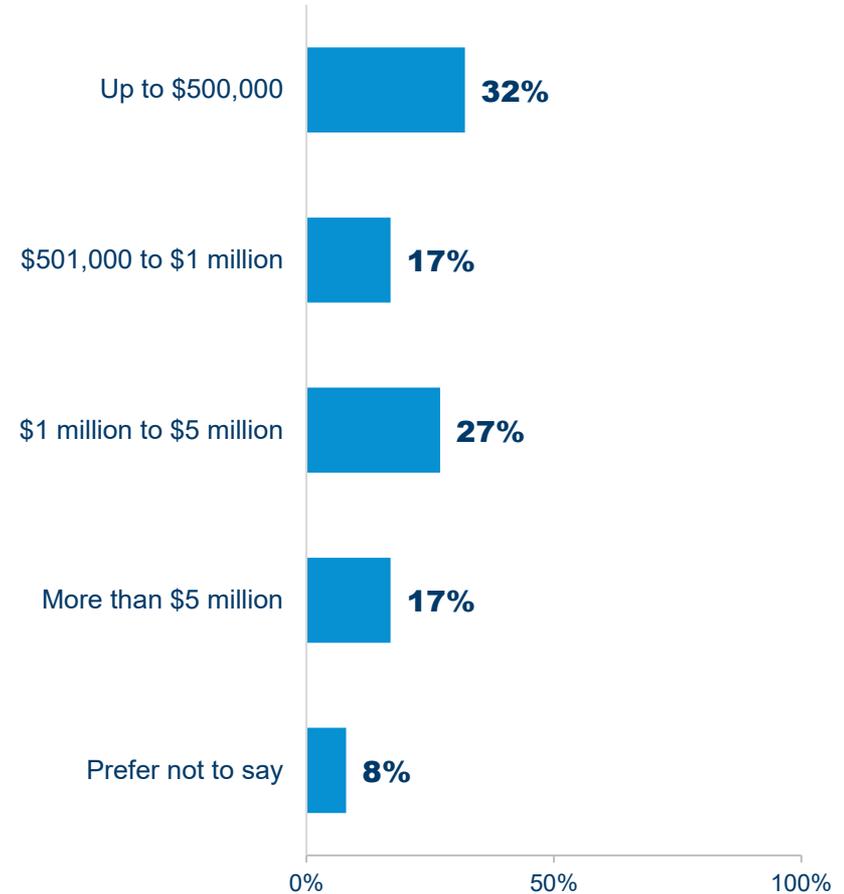
A third of these members in the survey are in the smallest category, with revenues in the **up to \$500K** band, while 17% have annual business valued between **\$500K and \$1m**.

More than two in five members have annual revenue from measurement, evaluation and insights of more than \$1m – 27% in the **\$1m to \$5m** category and 17% with **more than \$5m**.

The proportion who prefer not to say which band they fall into dips from 15% in 2019 to 8% this year.

Overall, smaller revenue members make up a larger proportion of the total in 2020 when compared with 2019 – 35% had revenues below \$1m last year, compared with 49% this year. In 2019, 50% of participants reported revenues of more than \$1m compared with 44% this year.

Later in this report, some charts contrast differences between the views of members who fall into three revenue categories – up to \$1m, \$1-5m and more than \$5m.



Q Thinking about the total annual value of your measurement, evaluation and insights business, which of these broad US Dollar revenue categories does your organisation fall into?
Base: All measurement & PR organisations only

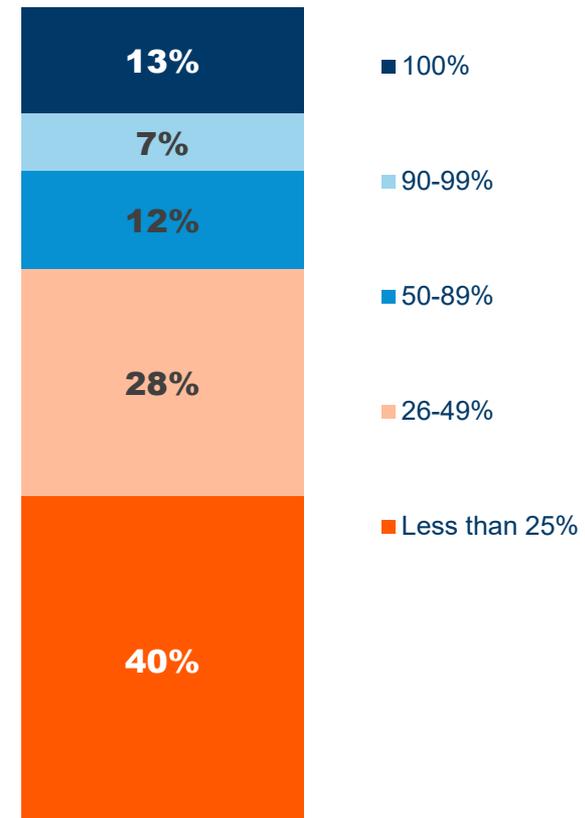
Revenue from measurement, evaluation & insights as % of total

A new question in the 2020 survey asks members in the measurement, consultancy and PR categories to estimate what proportion of their total business revenue is from measurement, evaluation and insights work.

Overall, a third of participating members say **at least half their organisation's total revenue is from measurement, evaluation and insights**, including 13% who generate all their income in this way, 7% who derive 90-99% and 12% who generate 50-89%.

The remaining 68% of members in the survey **generate less than half their revenue from measurement, evaluation and insights** – including 40% who generate less than 25% of their income in this way.

Members for whom measurement, evaluation and insights makes up less than 25% of revenues are most likely to be in the PR consultancy category (88%).



Q Approximately what proportion of your organisation's total business revenue is from measurement, evaluation and insights work?

Base: All measurement & PR organisations only

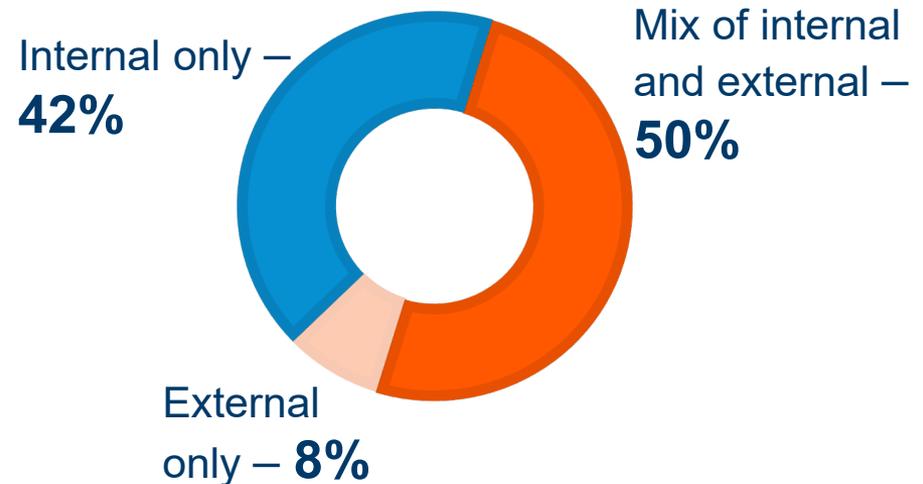
Use of resources

Members in the measurement, consultancy and PR categories are asked to indicate whether they use internal or external resources to undertake measurement, evaluation and insights work.

More than nine in ten use **internal resources** – 42% exclusively and 50% in conjunction with external resources.

Almost three in five use **external resources** – 8% exclusively and 50% alongside internal resources. Reliance on outside resources is more likely for PR consultancies (81%) by comparison with measurement and analytics firms (46%).

In the 2019 survey, a total of 82% used internal resources while a total of 37% used external resources.



Q Which of these do you use to carry out the measurement, evaluation and insights work you undertake for your clients?
Base: All measurement & PR organisations only

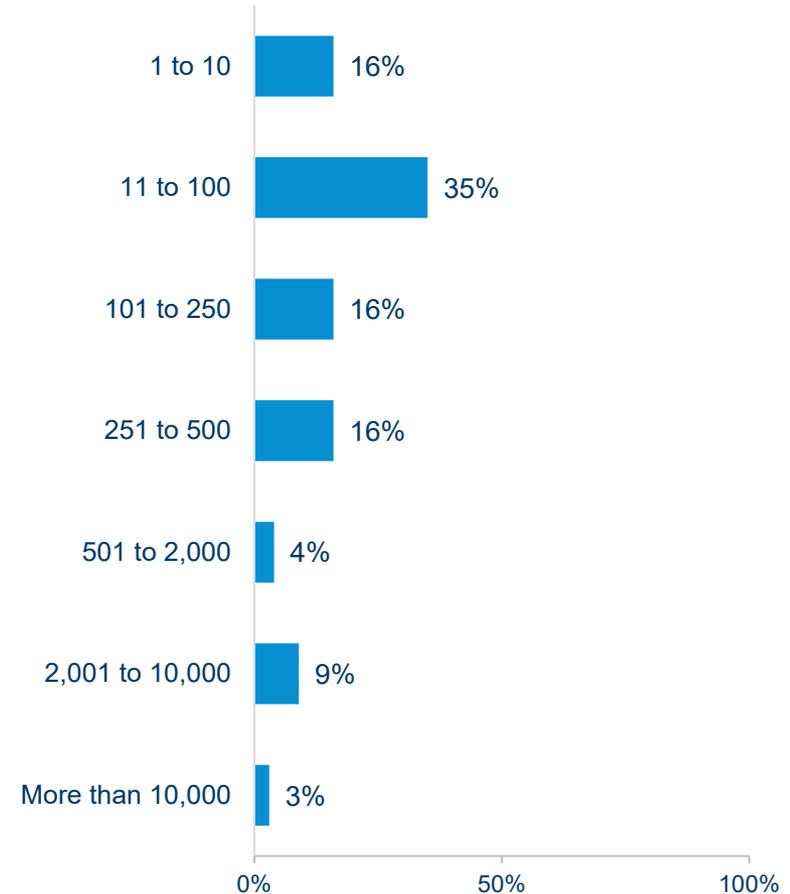
AMEC members – employee numbers

The second measure of overall organisation size in the survey is **total number of employees**. Unlike the revenue measure, the headcount measure asks about the whole organisation, not just about employees working in measurement, evaluation and insights.

The majority of members taking part in the survey are in Micro-, Small- or Medium-size firms. The smallest category of firm (1-10 employees) accounts for 16%, while 35% have 11-100 employees and 16% have 101 to 250 staff.

The remaining 32% of participants work in Large organisations, including 12% with more than 2,000 employees.

The larger organisations tend to be concentrated in AMEC's NFP membership - 55% of in-house participants have more than 2,000 staff, compared with 13% of PR consultancy members and 6% of measurement and analytics members.



Q Approximately how many employees in total does your organisation employ?

Base: All members

Where members undertake work

More than three in four members in the survey **carry out measurement, evaluation and insights work** in Europe, while 39% work in Asia Pacific, 36% in North America, 25% in Latin America and 25% elsewhere.

Across the G20 group of largest global economies, AMEC members are most likely to undertake work in the UK (48%), Germany (35%), USA (30%), France (26%) and Spain (25%).

One in five (19%) undertake measurement, evaluation and insights work in the largest Asia Pacific market – China - while 17% and 13% do so in Australia and Japan, respectively.

Elsewhere, 13% carry out work in Brazil, 12% in Mexico and 10% in Turkey.

Later in this report, some charts contrast differences between the views of members who undertake work in each of these five region categories, based on answers to this question. It's worth noting that some members are only included in one of the five regional groupings illustrated here, but the majority undertake work in more than one global region, and so are included in more than one category.



Europe – 77%



Asia Pacific – 39%



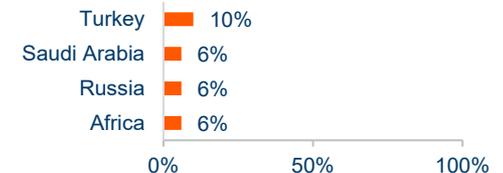
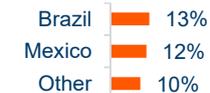
North America – 36%



Latin America – 25%



Other – 25%



Q In which of these locations does your organisation undertake measurement, evaluation and insights work?

Base: All members

HQ and office locations

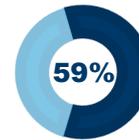
AMEC members taking part in the survey this year are located across the globe – with 27 different countries represented in the list of *HQ locations*.

HQs are most commonly in Europe (59%) – including 26% in the UK, 10% in the Benelux countries, 4% in Germany, 4% in Scandinavia and 4% in Eastern Europe.

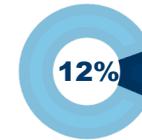
17% are headquartered in North America, 12% in Asia Pacific and 12% elsewhere, including 4% in Latin America.

Across the G20 countries, members in the survey are most likely to have an office in the UK (35%), Germany (26%), USA (25%), China (19%) and/or France (17%).

Headquarters location



Europe



Asia Pacific

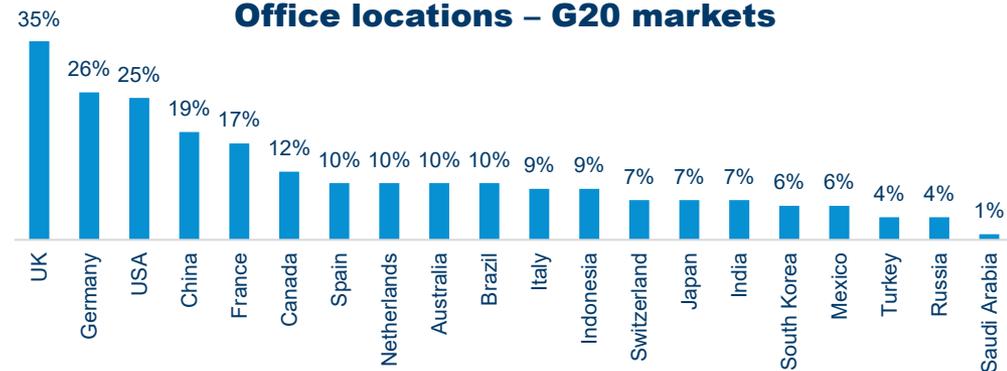


North America



Other

Office locations – G20 markets



Q In which country is your organisation's headquarters located?
 Q In which of these locations does your organisation have offices?
 Base: All members

Impact of COVID-19

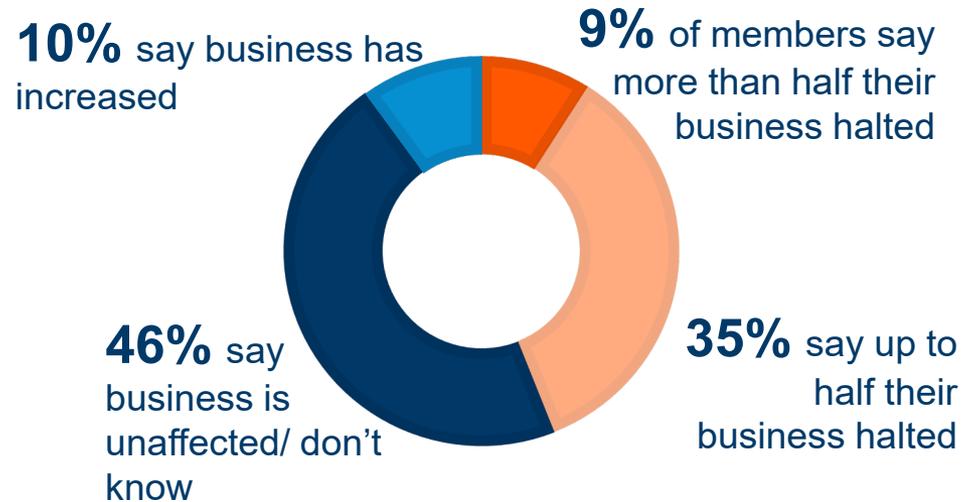
Overall business impact of COVID-19 outbreak

Fieldwork for the 2020 survey was carried out in the middle of the period of “lockdown” in many countries in response to the COVID-19 outbreak and subsequent health emergency.

AMEC members report a mixed response when asked about **the impact the pandemic has had on business activity**. One in ten (9%) report a substantial impact, with more than half their business halted or interrupted, and a further 35% say up to half their business has been affected.

Meanwhile, almost half (46%) say business is unaffected, while 10% report an increase in business activity as a result of the pandemic.

While overall, 44% of AMEC businesses report some level of business disruption caused by COVID-19, the figure varies from 27% amongst AMEC’s measurement and analytics members up to 75% of PR consultancy members.



% reporting ANY impact on business



Q How much of your organisation's business activity has been halted/ interrupted by the COVID-19 outbreak?

Base: All members

Impact of COVID-19 outbreak on specific activities

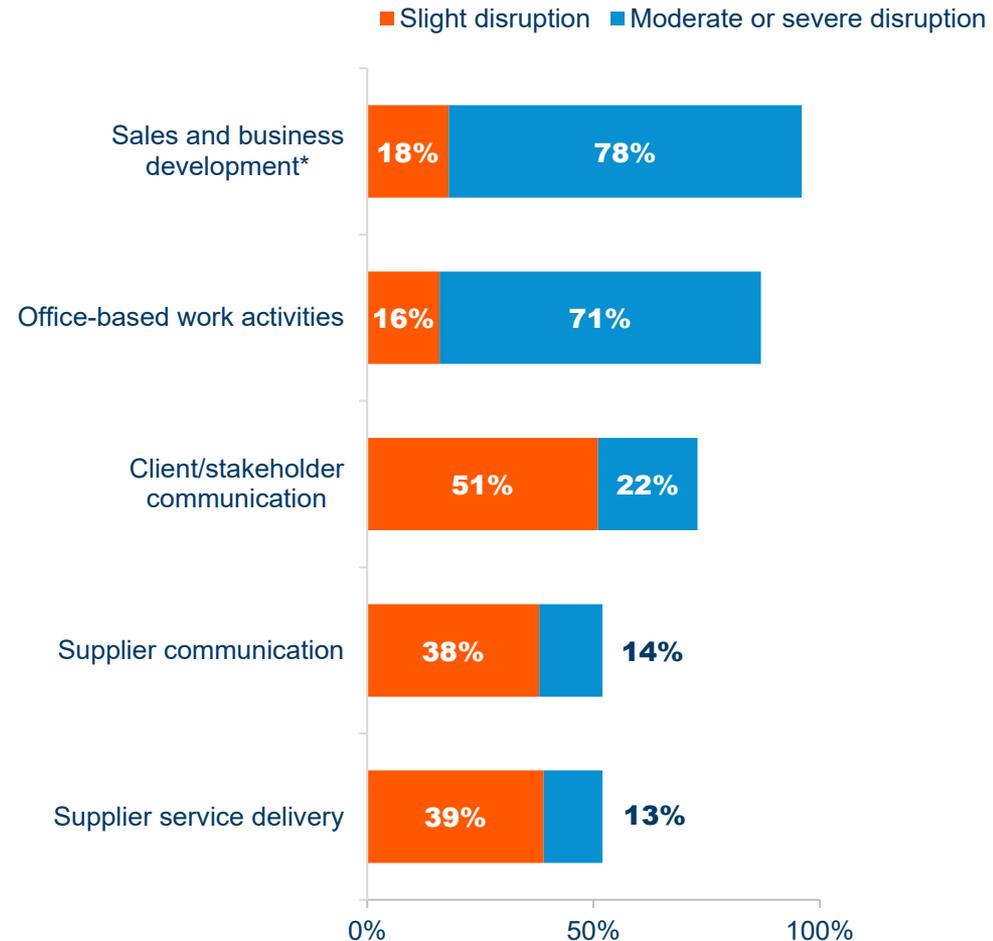
Members were asked to indicate how much business disruption they have faced as a result of the COVID-19 outbreak in five operational areas.

The greatest impact of the pandemic has been felt in terms of disruption to **sales and business development activity**, where 78% report moderate or severe disruption, and just 3% say they have not experienced any disruption.

Similarly, the majority (71%) have experienced moderate or severe disruption to **office-based working activity** (although 13% report no disruption).

In other aspects of business activity, the level of disruption has been less marked. While 51% report slight disruption to **communication with clients/ stakeholders**, only 22% report more extensive disruption in this area, and 28% say there has been no disruption.

Supplier communications and **service delivery** are least likely to have been impacted in a moderate or severe way (just 14% and 13% report this, respectively). Indeed, almost half (48%) say these aspects of supplier relationships are unaffected by the pandemic.



Q As a result of the COVID-19 outbreak, how much disruption has your business faced in each of the following areas?

Base: All members, except *All measurement and PR only

Other business impact of COVID-19

Members also had the opportunity to describe other ways in which the COVID-19 outbreak has impacted on their business. This was an open question – answers have been sorted into the different categories shown in the chart, alongside some example comments from members.

More than one in five (22%) commented that the pandemic disruption has led to **cancellations and a reduction in business volumes**, while 20% report clients **postponing/delaying business** to a later date. More generally, 13% commented on the difficulties created by the **high level of uncertainty about the future**, particularly in terms of business prospects.

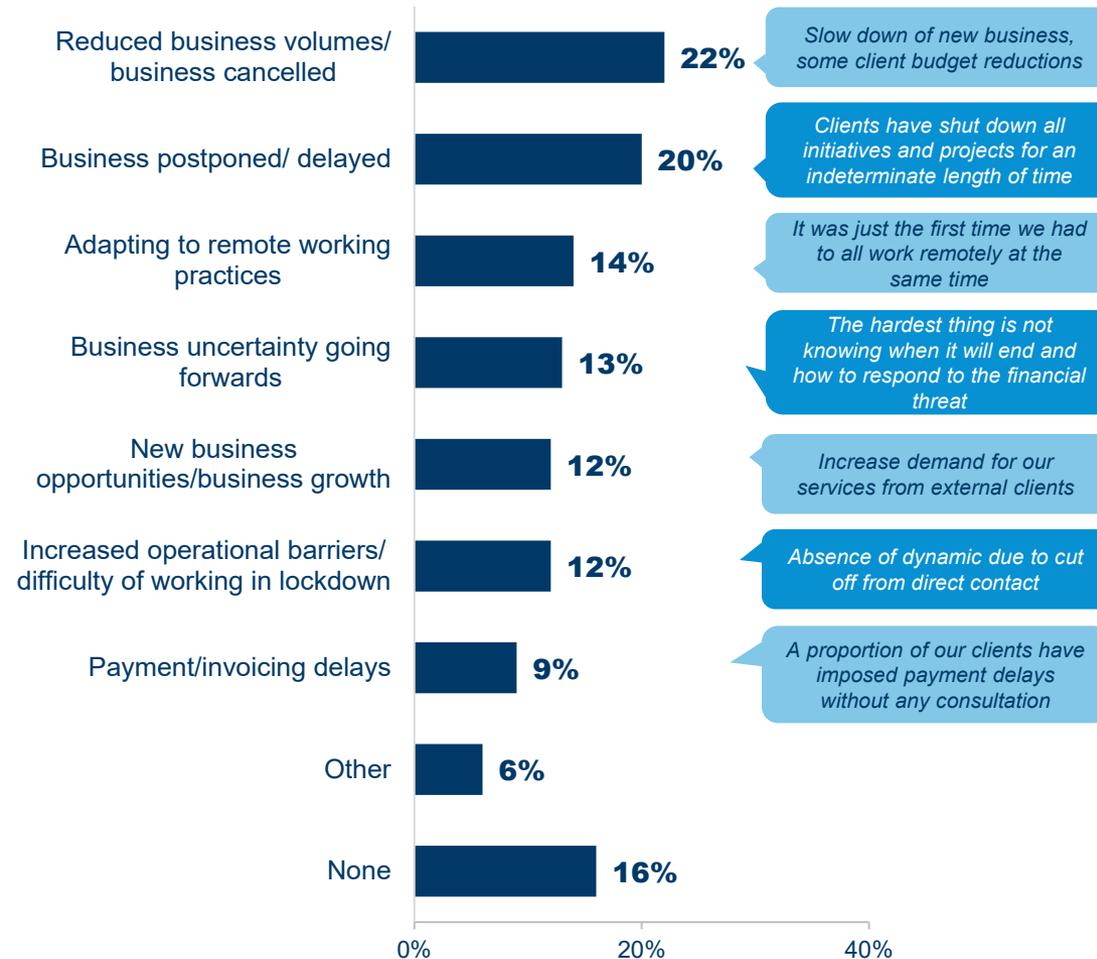
The adjustments involved in **rapidly moving to working remotely** is mentioned by 14%, and 12% mention **other barriers raised by the changed business environment**, for example having less regular contact with clients and changes in the range of media content and availability.

One in ten (9%) mention specific issues with **delays to invoice processing and payments**.

However, for 12%, the COVID-19 crisis has led to **new business opportunities**.

Q Please describe what other impact (from COVID-19), if any, has there been on your business

Base: All members



Growth and innovation

Industry growth – 2019-20

Asked to comment on growth in the 12 months prior to the survey, 69% of members feel **the industry has grown**, either significantly (14%) or slightly (55%), while just 7% say the industry has contracted.

In comparison with 2019, the total proportion saying the industry has grown is down from 80%. This slightly lower level of positivity is perhaps a reflection of the impact of the pandemic, which had led to widespread shutdown in the majority of developed economies by the time of the survey. Equally, the fact that 69% still feel the industry has grown reflects how well it is felt to have performed in the months prior to the COVID-19 outbreak.

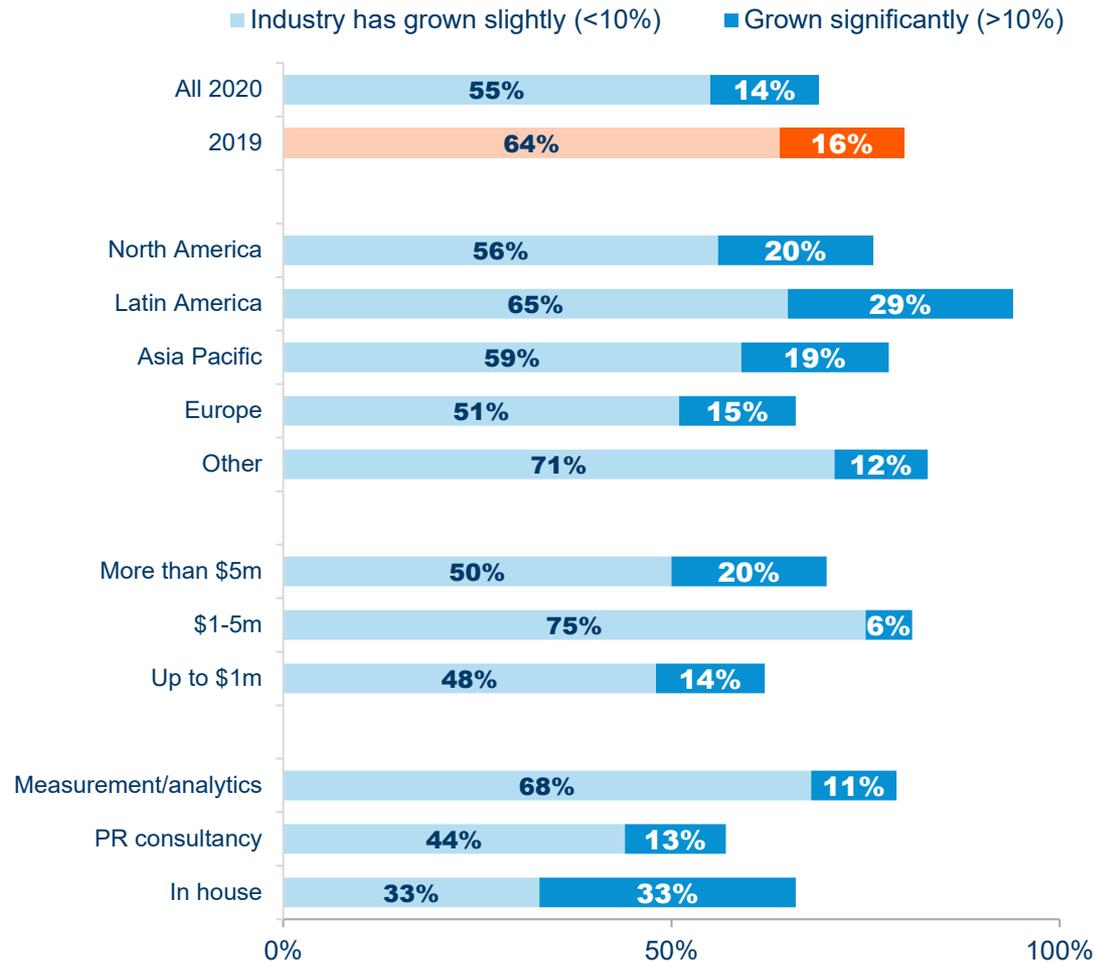
Members who operate in the Latin America region are most likely to report a growing industry (94%), compared with 76% operating in North America, 78% in Asia Pacific, 66% in Europe and 83% elsewhere.

In terms of business size, 81% with revenues in the \$1-5m bracket believe the industry has grown in the past year, compared with 70% of the larger firms with revenues exceeding \$5m and 62% in the category with revenues below \$1m.

Measurement and analytics firms in the membership (79%) are more bullish about the industry's performance than their peers in the in-house (66%) and PR (57%) categories.

Q Do you think the measurement, evaluation and insights industry has grown or contracted in the past 12 months?

Base: All members



Anticipated industry growth – 2020-21

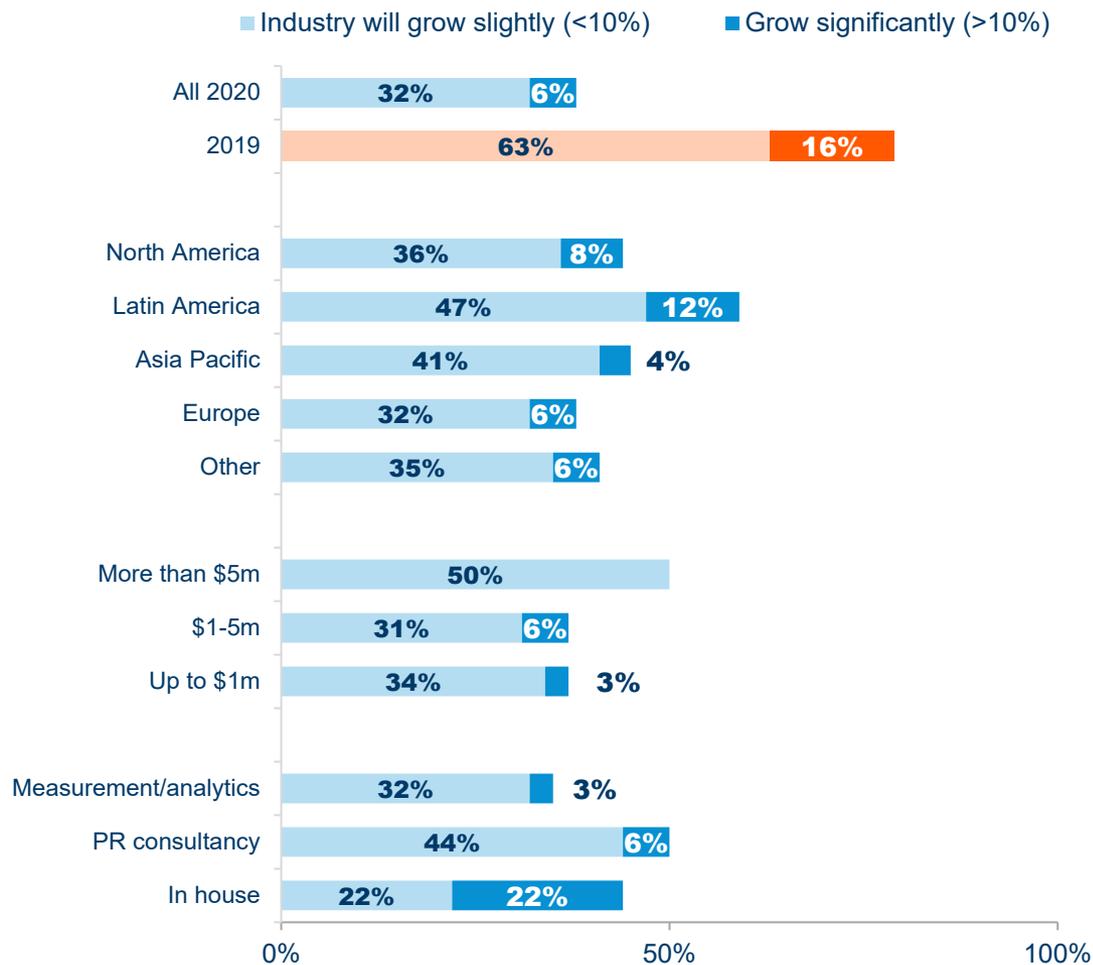
While seven in ten members say the industry grew in the past 12 months, **only 38% expect industry growth in the next year** – 32% anticipating growth of up to 10% and 6% forecasting a higher level of growth. Meanwhile, **39% expect the industry to contract**, including one in ten expecting significant contraction of more than 10%.

As the chart illustrates, the proportion anticipating growth across the industry as a whole has halved since the 2019 survey, when 79% expected growth in the upcoming 12 months.

When sub-groups in the membership are compared, firms operating in Latin America (59%) are most likely to forecast growth, while members operating in Europe are least likely (38%).

Larger members in the \$5m+ band are most likely to expect growth (50%), compared with 37% in each of the other size bands.

Members in the PR consultancy category (50%) report more optimism than in-house (44%) and measurement and analytics organisations (35%).



Q How do you think the measurement, evaluation and insights industry will perform in the coming 12 months?

Base: All members

Anticipated business growth – 2020-21

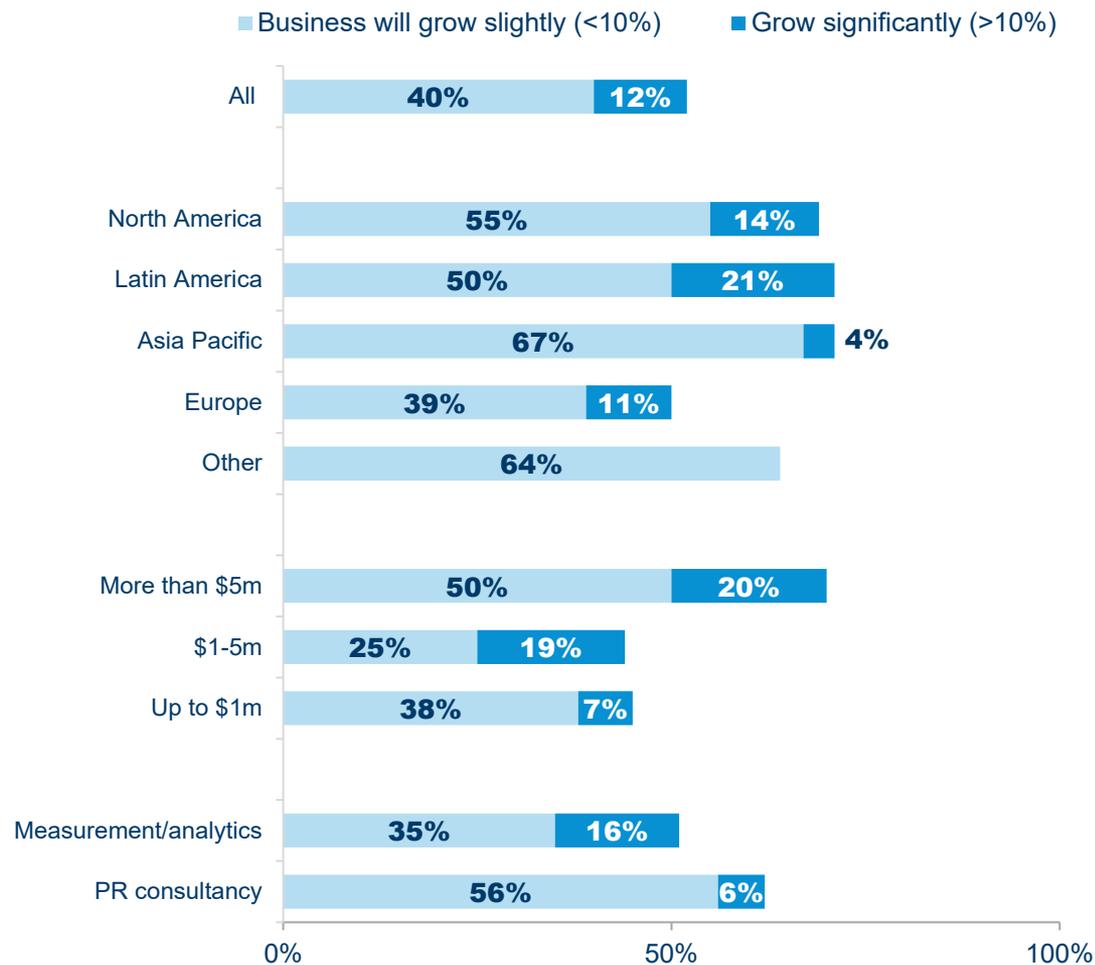
Members are more optimistic about **their own business prospects for the next 12 months** than for the growth prospects of the industry overall, with more than half (52%) expecting their own measurement, evaluation and insights revenue to grow. This includes 12% who forecast growth in excess of 10%.

Meanwhile, 18% forecast unchanged revenues in the coming year, while 25% expect revenues to contract, including 5% of members who anticipate a contraction of more than 10%.

Members who undertake work in Latin America and Asia Pacific are most likely to be anticipating growth in the coming year – 71% in each case – followed by 69% expecting revenue growth amongst members working in North America. By contrast, only 50% of members operating in Europe predict revenue growth.

AMEC's larger members are the most optimistic, with 70% of firms with revenues in excess of \$5m anticipating revenue gains, compared with 44% in the \$1-5m band and 45% of firms generating revenues below \$1m.

PR consultancy members are slightly more optimistic about growth prospects (62%) than measurement and analytics members (51%).



Q How do you expect your organisation's revenue from measurement, evaluation and insights to change in the coming 12 months?

Base: All measurement & PR organisations only

Business activities driving growth

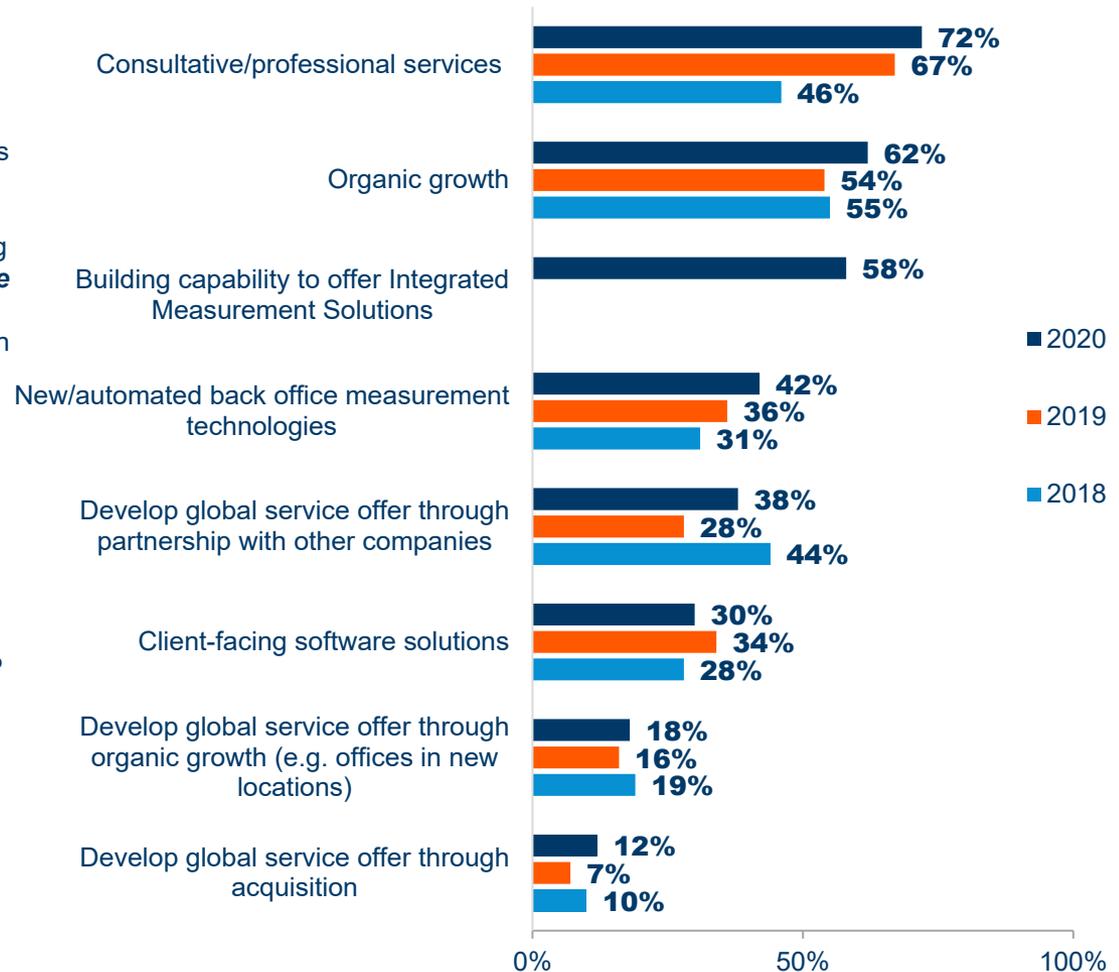
With more than half of members anticipating revenue growth in their own business during the next 12 months, despite the disruption caused by the COVID-19 pandemic, members identify a range of business activities they will be focussing on to drive this growth.

As in 2019, AMEC members are most likely to be building their growth strategy around the provision of **consultative /professional services**. More than seven in ten (72%) say this is part of their approach - a higher proportion than in either of the previous two years.

Six in ten (62%) expect growth to be **organic**, up from 54% in 2019, and almost as many (58%) are **building capability to offer Integrated Measurement Services** which is included on the list for the first time this year.

In total, 42% include **new/automated back office measurement technology** in their growth strategy – more than in either of the previous two years – while 38% are focussing on the development of their **global service offer by partnering with other companies**.

Smaller numbers say that **client-facing software solutions** (30%), **developing a global service offer through organic growth** (18%) and **overseas acquisitions** (12%) form part of their approach to driving growth.



Q Which areas of business activity are you mainly focusing on to drive measurement, evaluation and insights revenue growth in the next 12 months?

Base: All measurement & PR organisations only

Business environment

Competition and pricing

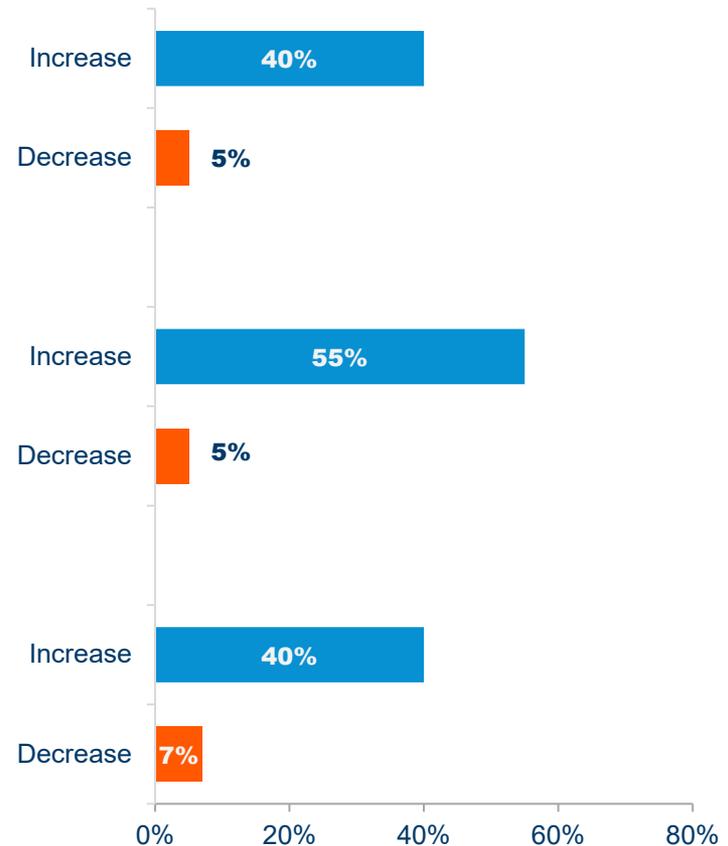
Members are asked to indicate how a number of different aspects of their measurement, evaluation and insights business environment have changed during the previous 12 months, including three aspects of competition and pricing.

Overall, 40% of members say that **competition for new business has increased**, including 8% reporting a large increase. The overall figure is similar to 2019 (44%), although the number seeing a *large* increase is down from 17%. Increasing competition for new business is most acute for firms in the more than \$5m revenue category (80%), less so for \$1-5m firms (44%) and those with revenues below \$1m (31%).

More than half (55%) say that **client pressure to reduce prices** has increased in the past year, almost unchanged on 2019 (56%), although the proportion reporting a *large* increase is down from 25% last year to 8% in 2020. Pressure on prices also varies by business size, with 48% reporting an increase among firms with revenues below \$1m, 50% in the \$1-5m bracket and 90% of firms with revenues exceeding \$5m.

Meanwhile, 40% of members say they have increased **fees to clients** in the past 12 months, up from 36% in 2019. All 40% report a small increase in fees rather than large, and 7% say they have had to decrease fees in the past year.

Competition for new business



Q Across the whole of the past 12 months, have you seen an increase or decrease in the following aspects of your measurement, evaluation and insights business?
Base: All measurement & PR organisations only

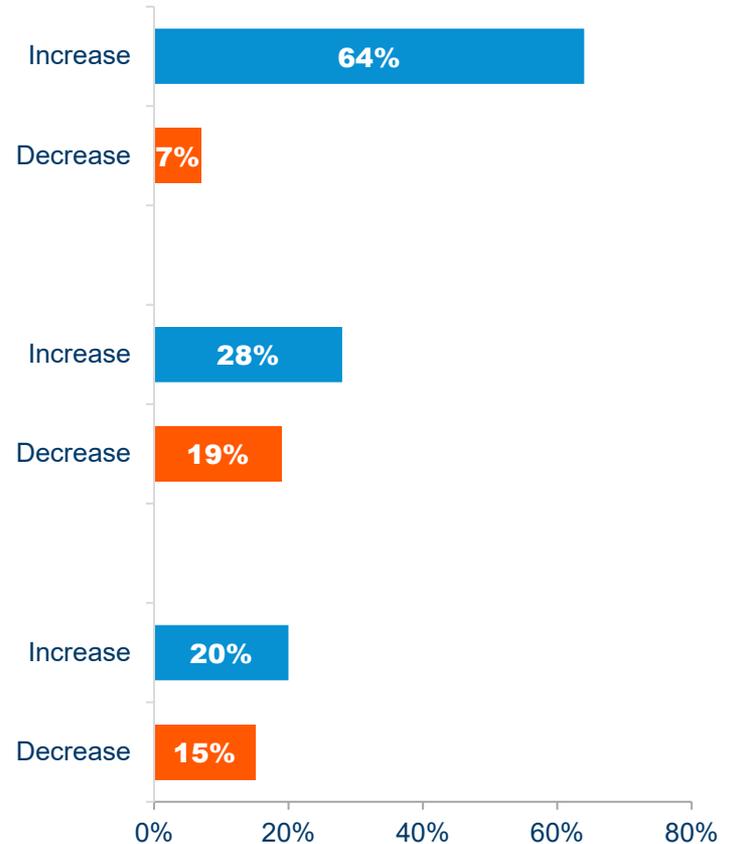
New business

Almost two-thirds (64%) of members say their **number of new clients** has increased in the past year – 57% a *small* increase and 7% a *large* increase. Growth in the number of new clients is strongest in the \$1-5m revenue category (76%), compared with 50% for firms with revenues of more than \$5m and 55% of those with less than \$1m revenues. While this is a sign of healthy growth in the market for measurement, evaluation and insights services, the overall proportion reporting an increase is down from 76% in 2019.

In terms of the **number of RFPs/tenders**, 28% of members report an increase in the past year, compared with more than twice as many (56%) in 2019. At the same time, the proportion of members reporting a decrease in the number of RFPs is up from 3% last year to 19% in 2020 – this varies from 22% of measurement and analytics firms reporting a decrease down to just 6% amongst PR consultancy members.

One in five members (20%) report an increase in the **number of international RFPs/tenders** during the past year, down from 32% in 2019. Meanwhile the proportion who report a decrease in the number of international tenders is up from 7% last year to 15% this time.

Number of new clients



Overall number of RFPs/ tenders

Number of international RFPs/ tenders

Q Across the whole of the past 12 months, have you seen an increase or decrease in the following aspects of your measurement, evaluation and insights business?

Base: All measurement & PR organisations only

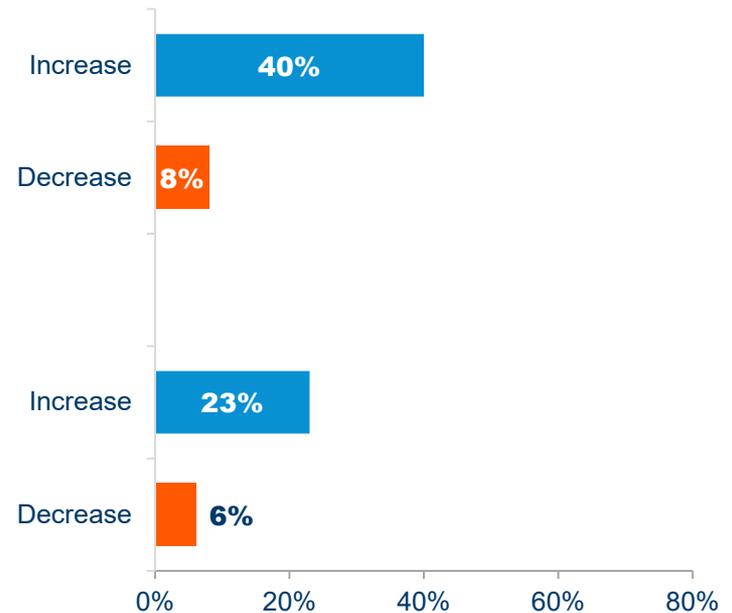
Partnerships

Two in five members (40%) report an increase in the extent to which they **work in partnerships with other firms** during the past 12 months, while 8% say partnership working has declined in frequency. The figures reflect a slight slowdown in the rate of growth in this aspect of business operations – in 2019, 49% reported an increase and just 2% a decrease. Increasing the use of partnerships is more prevalent for measurement and analytics members (46%) than PR consultancy members (25%).

For 23%, the number of **industry partnerships with other AMEC members** has increased in the past year, while 6% report a decrease. Figures on this measure are broadly similar year-on-year – in 2019, 26% reported an increase and 8% a decrease.

Working in partnership with other firms

Industry partnerships with other AMEC members*



Q Across the whole of the past 12 months, have you seen an increase or decrease in the following aspects of your measurement, evaluation and insights business?

Base: All measurement & PR organisations only, *All members

Investment in innovation

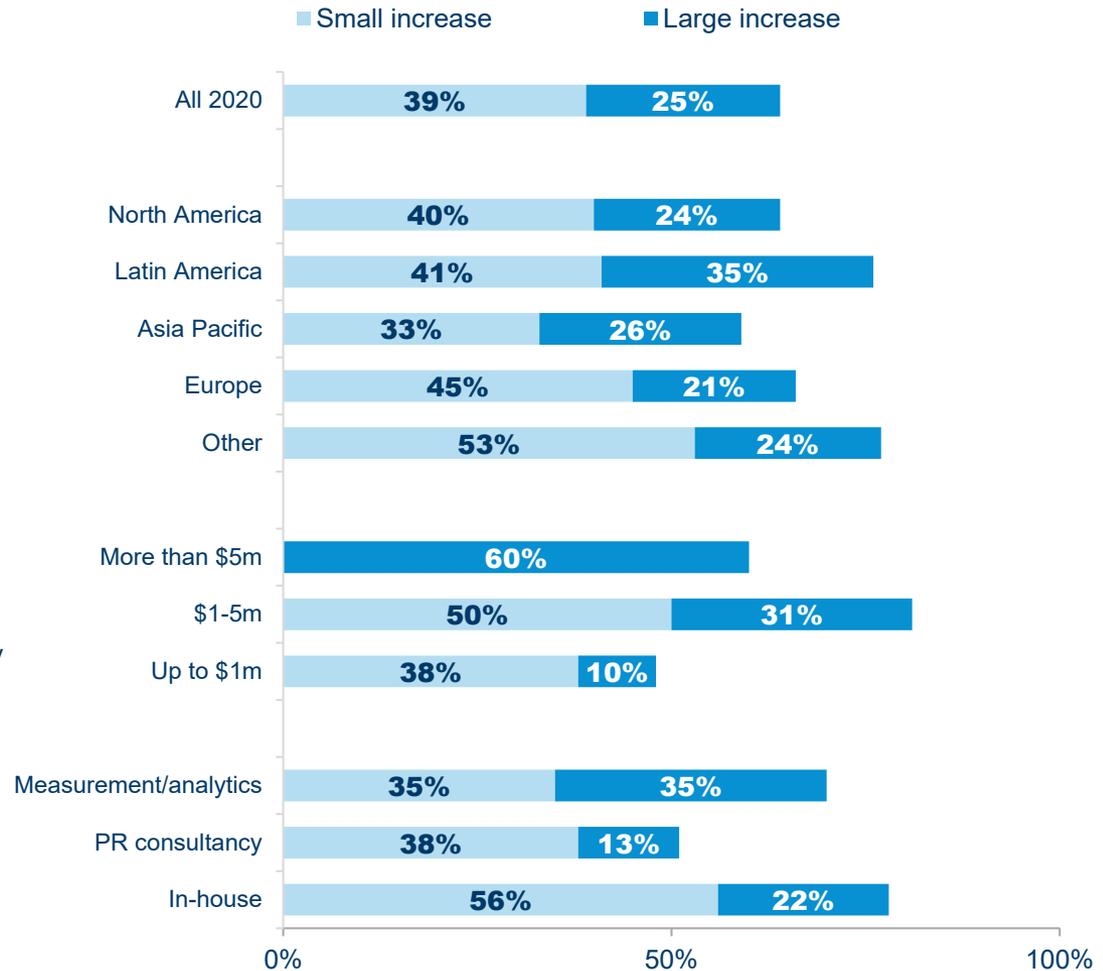
In the 12 months to April 2020, 64% of AMEC members have **increased investment in innovation**, such as new products, services and systems, including 25% who report a **large** increase. Meanwhile, 9% report a decrease in this kind of investment.

The question wording has been slightly modified since 2019. However, it's unlikely that the change in wording will have led to the change in the way members have answered the question.

For the 12 months prior to the 2020 survey, fewer members report an increase in investment in innovation than for any of the past four years. Last year, 82% said investment had increased, preceded by 72% in 2018, 83% in 2017 and 76% in 2016.

As the chart illustrates, investment is most widespread in the \$1-5m business revenue category where 81% say they have increased investment, compared with 60% of firms with revenues of more than \$5m and 48% of organisations with less than \$1m in revenues.

Investment in innovation is also more common in the in-house (78%) and measurement and analytics (70%) categories than for PR consultancies (51%).



Q Across the whole of the past 12 months, have you seen an increase or decrease in your organisation's level of investment in innovation (e.g. new products, services and systems)?

Base: All members

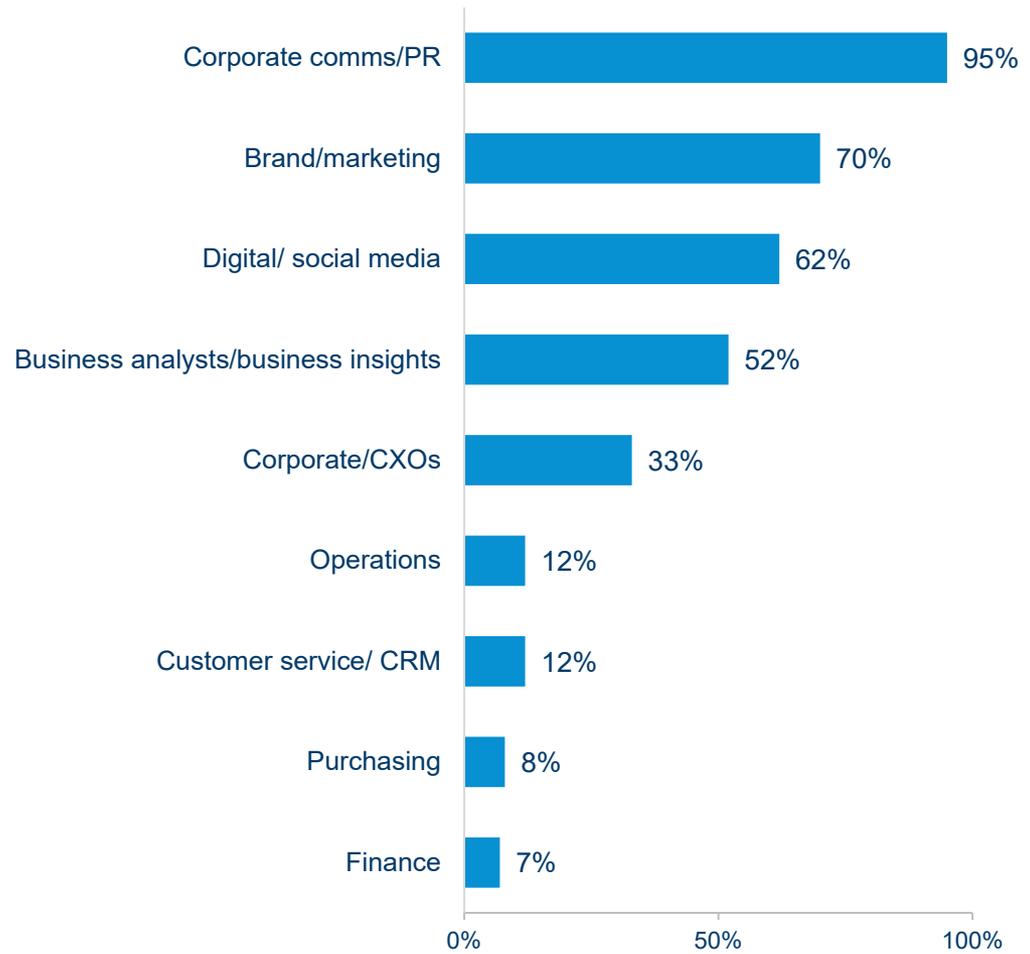
Commissioning clients

Almost all AMEC members who undertake client work receive direct commissions from clients based in **corporate communications/PR functions** (95%).

The majority have direct clients based in the **brand / marketing** function (70%), the **digital/ social media** function (62%) and **business analysis/ insights** functions (52%).

One in three members (33%) have direct commissions from the **corporate/CXO** function.

Beyond this, 12% of AMEC members have work commissioned out of **operations** teams and/ or the **customer service/ CRM** function, 8% have direct clients in **purchasing** and 7% in **finance**.



Q In which of the following functions/departments do you have clients who directly commission your organisation's services?

Base: All measurement & PR organisations only

Industry trends

Investment in new technology

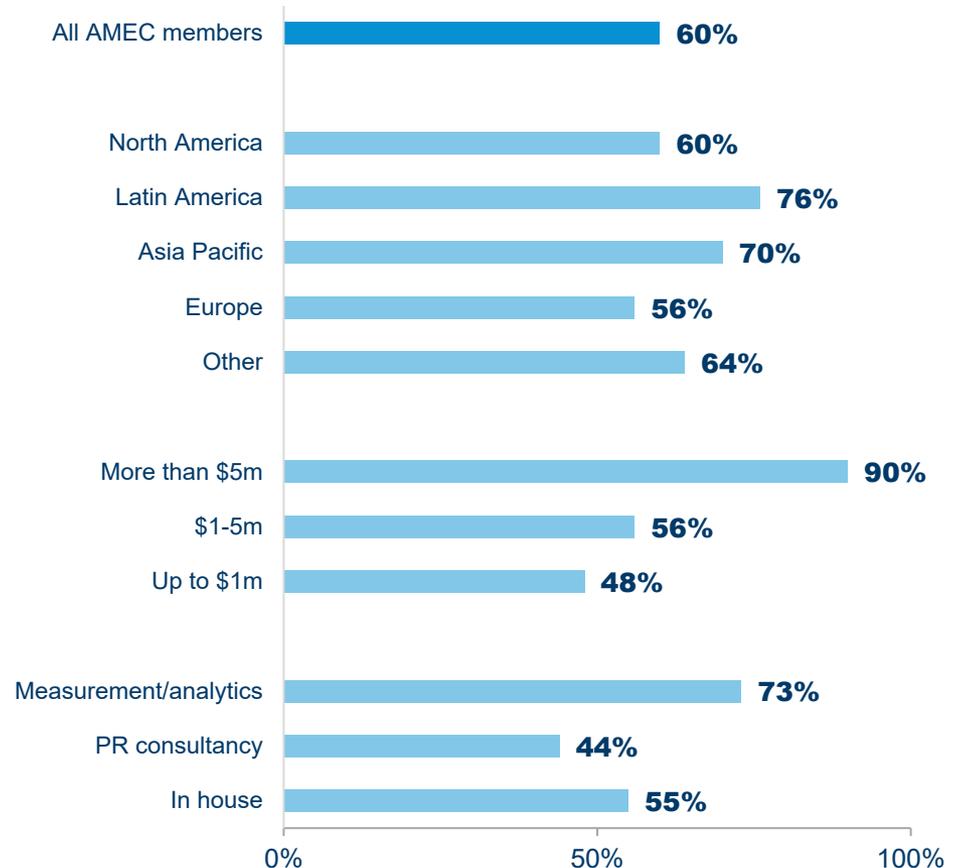
Three in five (60%) AMEC members agree that their **business can only compete effectively by investing in technology**, somewhat fewer than in 2019 (74%) or 2018 (68%). This year, 25% disagree with the statement, up from 11% in 2019.

Members who undertake work in Latin America are most likely to be believers in the importance of investment in technology (76%), while members working in Europe are least likely to do so.

AMEC's largest members are most likely to believe they can only compete effectively by investing in technology – 90% agree, compared to 56% of their counterparts in organisations with revenues of \$1-5m and 48% in firms with revenues below \$1m.

The importance of investment in technology to maintain a competitive edge receives greater endorsement from measurement and analytics members (73%) than members in PR consultancies (44%) or in-house (55%).

Strongly agree/agree that my business can only compete effectively by investing in new technology



Q Thinking about how the landscape for measurement, evaluation and insights work has changed in the past 12 months, please indicate below how much you agree or disagree with this statement

Base: All members

Demand for insights

As illustrated earlier in this report, members place the development of enhanced consultative and professional services at the forefront of their growth strategies, and this reflects a perceived growth in client **emphasis on insights, with less emphasis on measurement and evaluation**, identified by 64% this year.

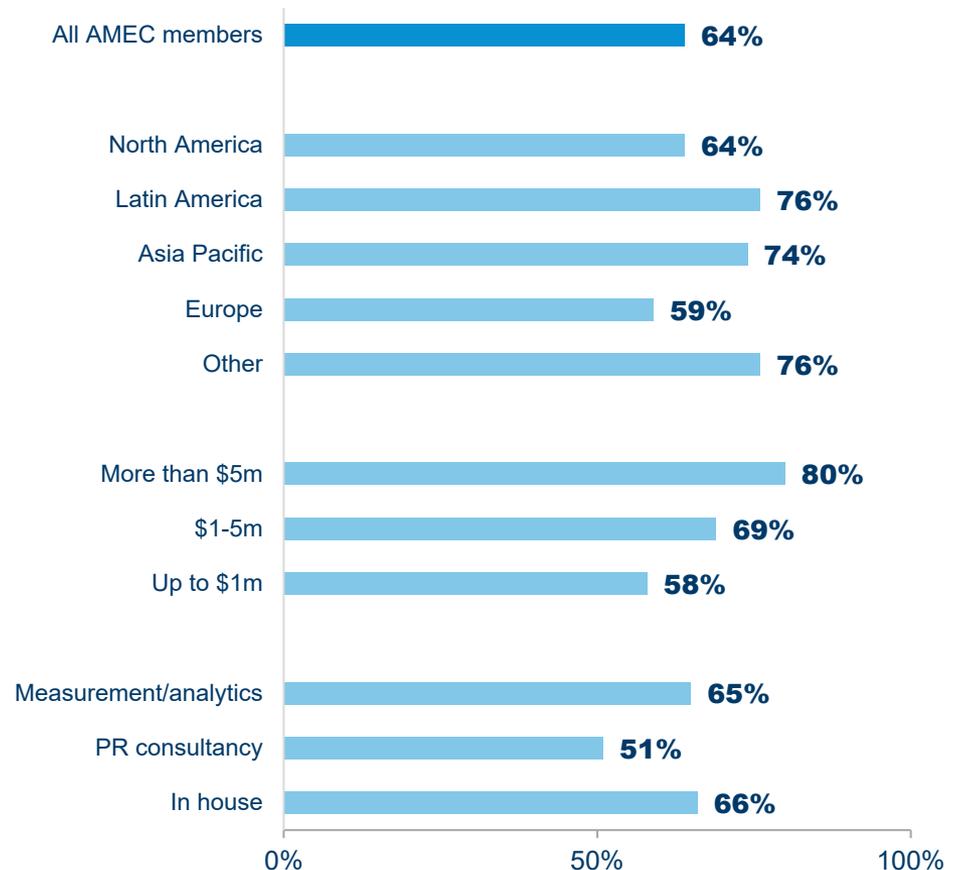
Over half of AMEC's members have agreed with this statement every year since 2015, and this year's figure is up from 59% in 2019.

The majority of AMEC members undertaking work in all five regional categories acknowledge this trend, most notably those working in Latin America and the Other category (primarily Africa and the Middle East), in both of which the level stands at 76%.

The trend for more emphasis on insights is most apparent for members with revenues in excess of \$5m (80%), compared with 69% of those with revenues in the \$1-5m range and 58% of firms with revenues below \$1m.

Measurement and analytics firms (65%) and in-house members (66%) are more likely to agree with the statement than members in PR consultancies (51%).

Strongly agree/agree that clients/ stakeholders put increasing emphasis on insights and less on measurement and evaluation



Q Thinking about how the landscape for measurement, evaluation and insights work has changed in the past 12 months, please indicate below how much you agree or disagree with this statement

Base: All members

Demand for sophisticated evaluation

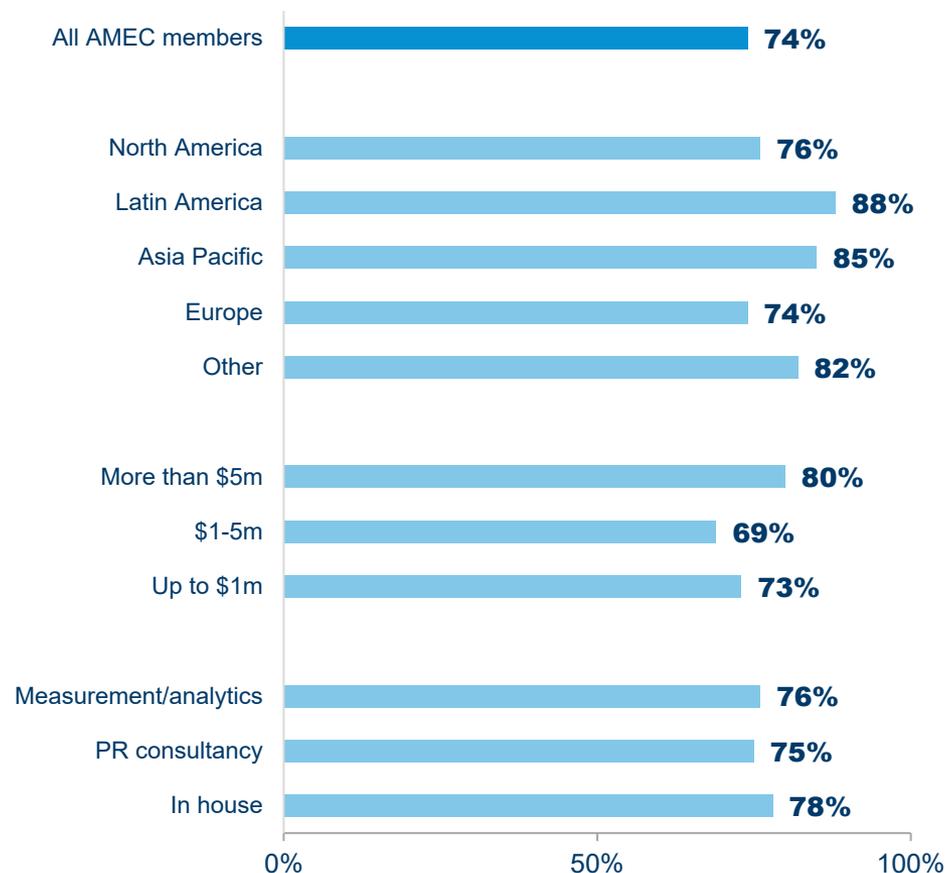
Another trend which most members identify is the growth in client demand for **increasingly sophisticated types of evaluation to demonstrate the benefits of communications activity**. In both 2018 and 2019, 70% of members agreed that this is the case, and this notches up to 74% in 2020.

The increasing demand for more sophisticated types of evaluation is most likely to be identified among members who undertake work in Latin America (88%) and Asia Pacific (85%).

Members with revenues exceeding \$5m (80%) are slightly more likely to be witnessing greater demand for more sophistication than those with revenues of \$1-5m (69%) and those with revenues below \$1m (73%).

Growing demand for sophisticated analysis is more or less equally identified across all categories of member – measurement and analytics (76%), PR consultancy (75%) and in-house (78%).

Strongly agree/agree that clients/ stakeholders are asking for increasingly sophisticated types of evaluation to demonstrate benefits of comms activity



Q Thinking about how the landscape for measurement, evaluation and insights work has changed in the past 12 months, please indicate below how much you agree or disagree with this statement

Base: All members

Demand for integrated measurement

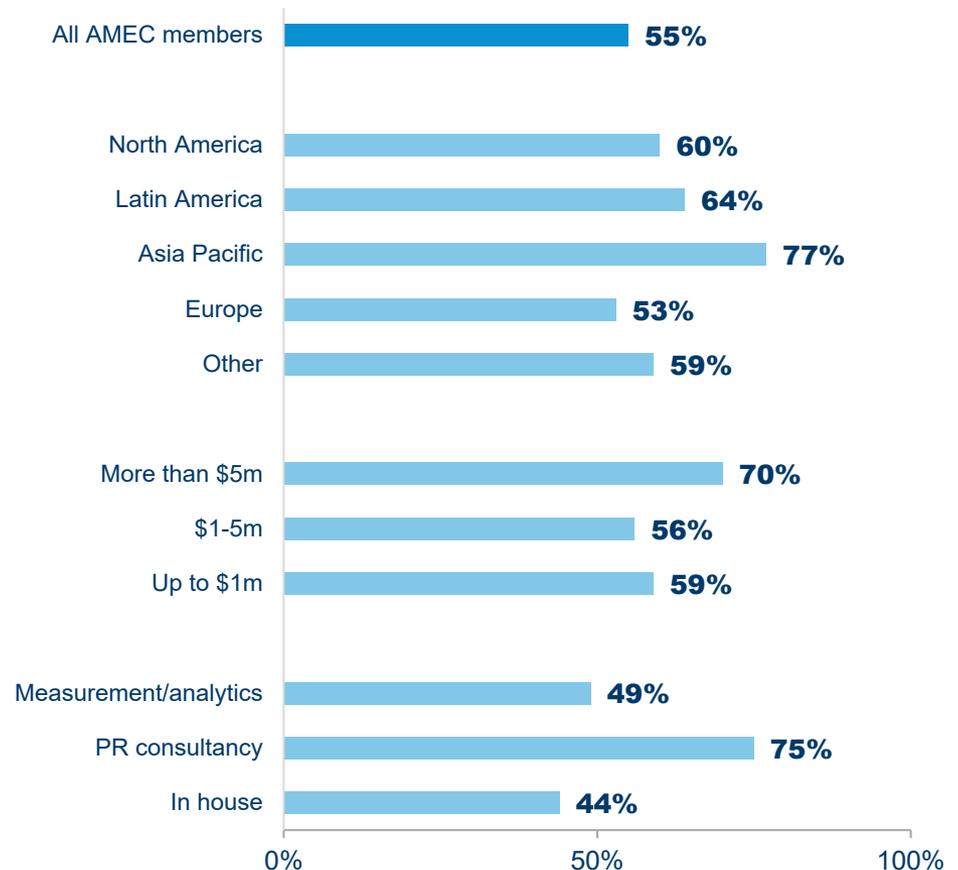
Another trend identified by AMEC members in recent years is the growing demand for **measurement which includes other marketing activity as well as PR/comms, in order to provide an integrated perspective**. However, while 76% agreed that this kind of expectation is becoming more common in the 2019 survey, the proportion agreeing has declined to 55% this year.

Members who carry out work in the Asia Pacific region (77%) are more likely to have encountered a growth in demand for integrated measurement programmes than those operating elsewhere, including Europe, where the lowest proportion of members agree (53%).

While there is little difference between the smaller members with revenues below \$1m (59%) and those with revenues between \$1-5m (56%), the largest member companies with revenues above \$5m are more likely to be seeing this trend (70%).

Growth in demand for integrated measurement approaches is far more a feature of the PR consultancy business environment (75%) than for measurement and analytics companies (49%) or in-house functions (44%).

Strongly agree/agree that clients/ stakeholders are increasingly asking for measurement which includes other marketing activity as well as PR/comms to provide an integrated perspective



Q Thinking about how the landscape for measurement, evaluation and insights work has changed in the past 12 months, please indicate below how much you agree or disagree with this statement

Base: All members

Using AI

As in the previous two years, the 2020 survey asked members to say if they are already using each of a series of **Artificial Intelligence (AI)** approaches in their measurement, evaluation and insights business.

The top three uses of AI on the list – keyword matching (72%), topic/thematic identification (62%) and influencer identification (56%) – are the same as in 2019, and the number of members saying they use each of the three has grown year-on-year since the question was first asked in 2018.

Following a dip in 2019, the proportion using entity extraction (54%) is fourth on the list, followed by automated sentiment (50%) and digital tracking of online user journeys (24%).

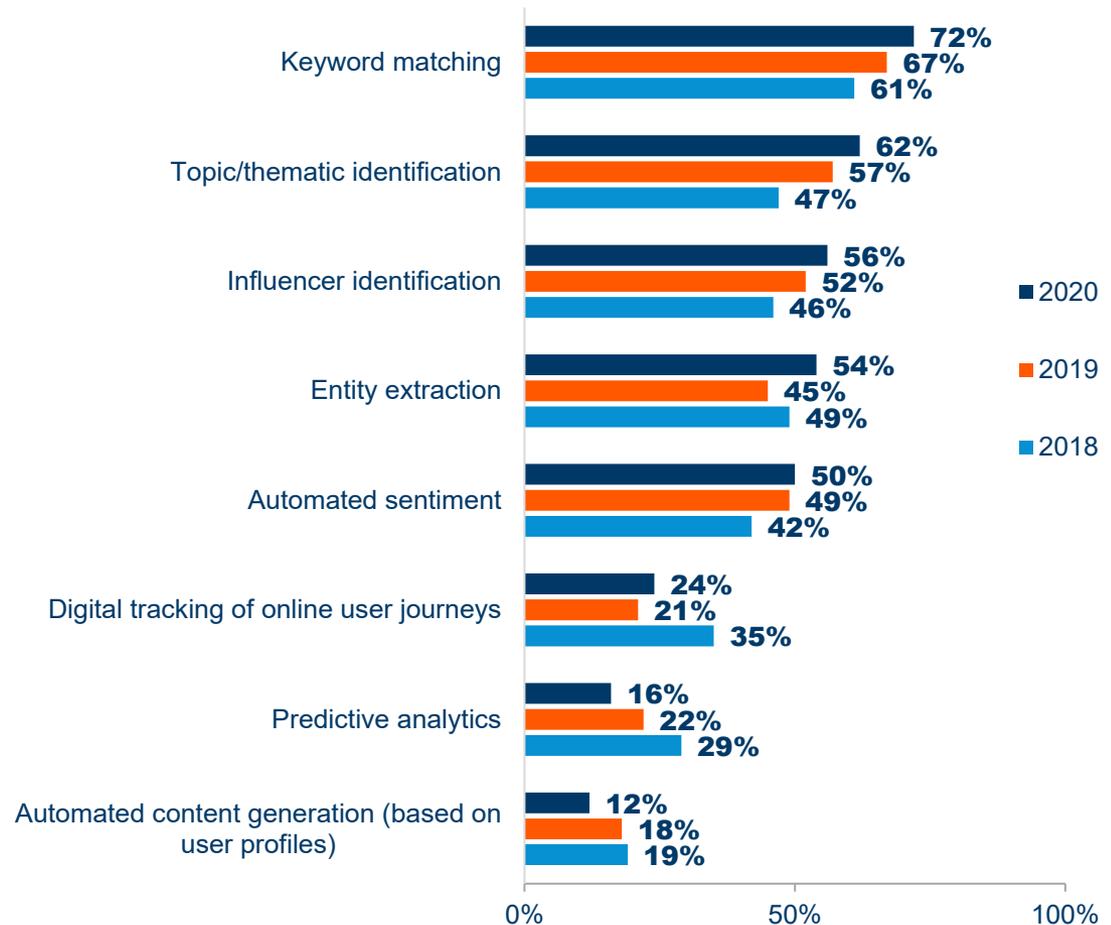
Meanwhile, the proportions of members who use predictive analysis (16%) and automated content generation (12%) are comparatively small, having declined year-on-year since the question was first asked in 2018.

Members are also asked if they have **actively decided NOT to use** each of these AI options. Most commonly, uses of AI members decide to avoid are: automated content generation (28%), automated sentiment (24%), predictive analysis (18%) and digital tracking of online user journeys (18%).

Q For each of the following uses of AI please indicate if you are already using this in your measurement, evaluation and insights business?

Base: All

% already using this in their business



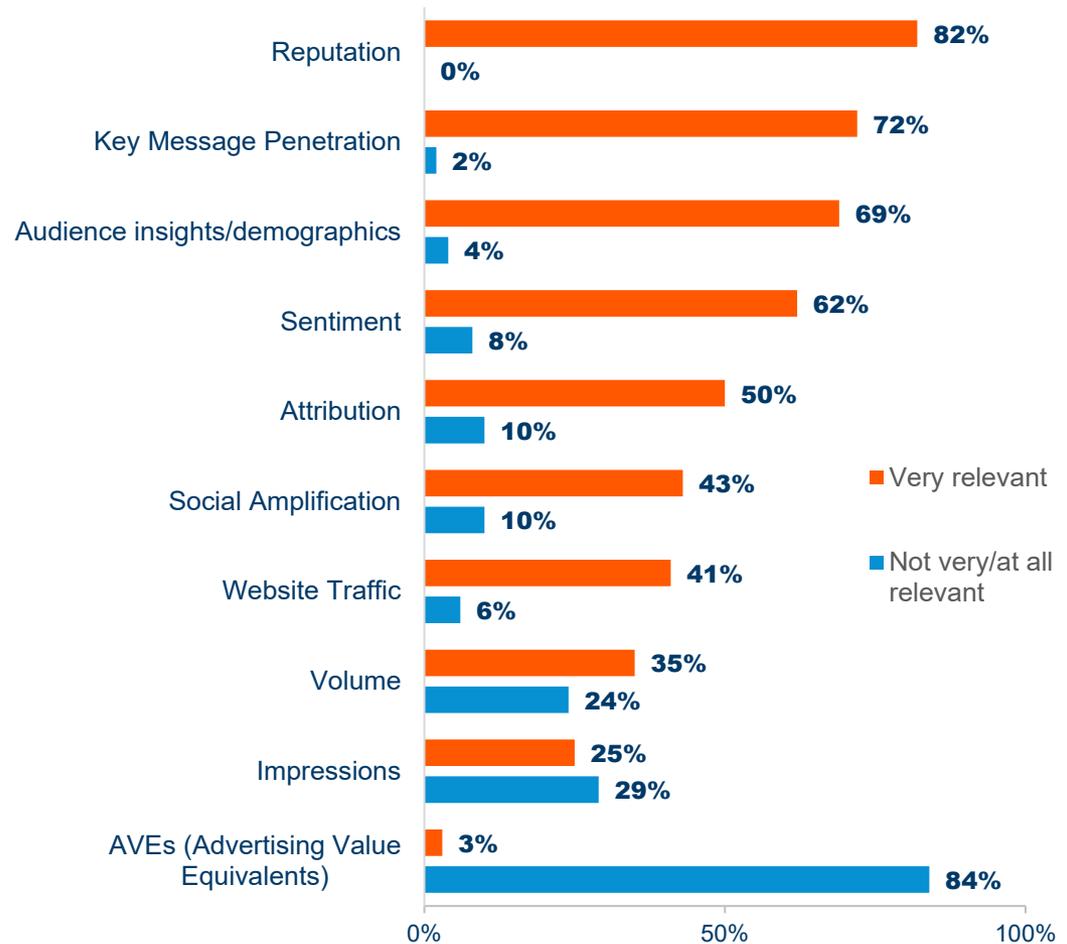
Relevance of metrics in 2020

In a new question for 2020, members were asked **how relevant 10 different metrics are to the measurement of communications** in 2020. Members were asked to assess these metrics as *very relevant*, *somewhat relevant*, *not very relevant* or *not at all relevant*.

For most metrics, the combined score of *very* and *somewhat relevant* is high, so in order to make priorities more distinct, the orange bar on the chart shows the proportion saying each metric is *very relevant* only. Meanwhile, the blue bar shows a combination of not very relevant and *not at all relevant*. The number of *somewhat relevant* ratings is not shown.

Reputation (82%), key message penetration (72%), audience insights and demographics (69%) and sentiment (62%) are deemed the most relevant, while volume (35%), impressions (25%) and AVEs (3%) are least likely to be seen as *very relevant*.

Meanwhile, more than four in five members (84%) see AVEs as *not very/at all relevant* to the measurement, evaluation and insights industry now. 29% feel that impressions are not a relevant metric, and 24% say the same about volume.



Q In your view, how relevant are each of the following metrics to the evaluation of communications in 2020?

Base: All

Client/stakeholder expectations

Client work specifications

Clients always/mostly specify...

Asked about the way clients and stakeholders specify the kind of work commissioned, the majority of members (78%) say projects are designed to measure both **media quantity and quality**. The figure for this measure has maintained at around eight in ten since the question was first asked back in 2015.

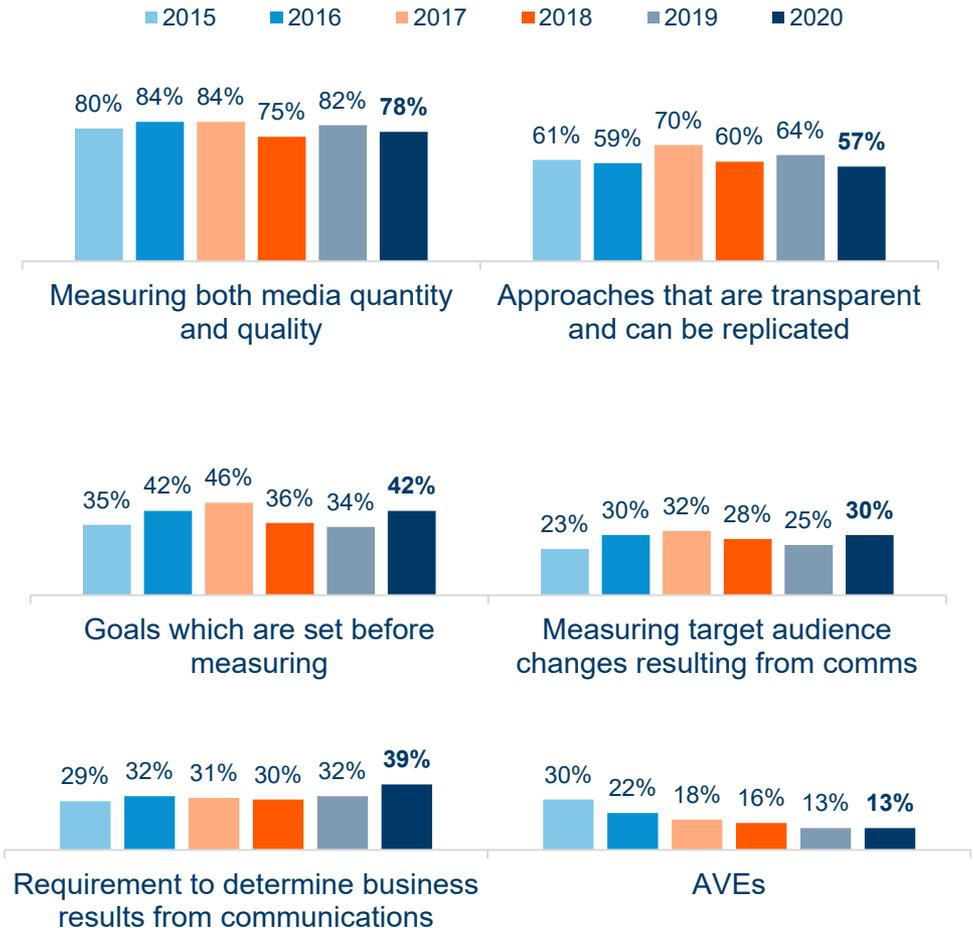
Almost six in 10 clients (57%) expect **approaches that are transparent and can be replicated**, while 42% want **goals which are set before measuring**. In addition, 30% of clients expect commissioned work to **measure target audience changes resulting from communications**.

There is an uptick this year in the proportion of clients specifying the need for commissioned work to **determine business results from communications**. At 39%, the proportion who say this is always/usually part of project specifications is the highest since the question was first asked five years ago.

As in 2019, 13% of members say their clients and/or stakeholders typically expect **AVEs** to be part of their measurement, evaluation and insights programmes.

Q How often does measurement, evaluation and insights work commissioned by your clients/stakeholders specify the following?

Base: All



Media channels

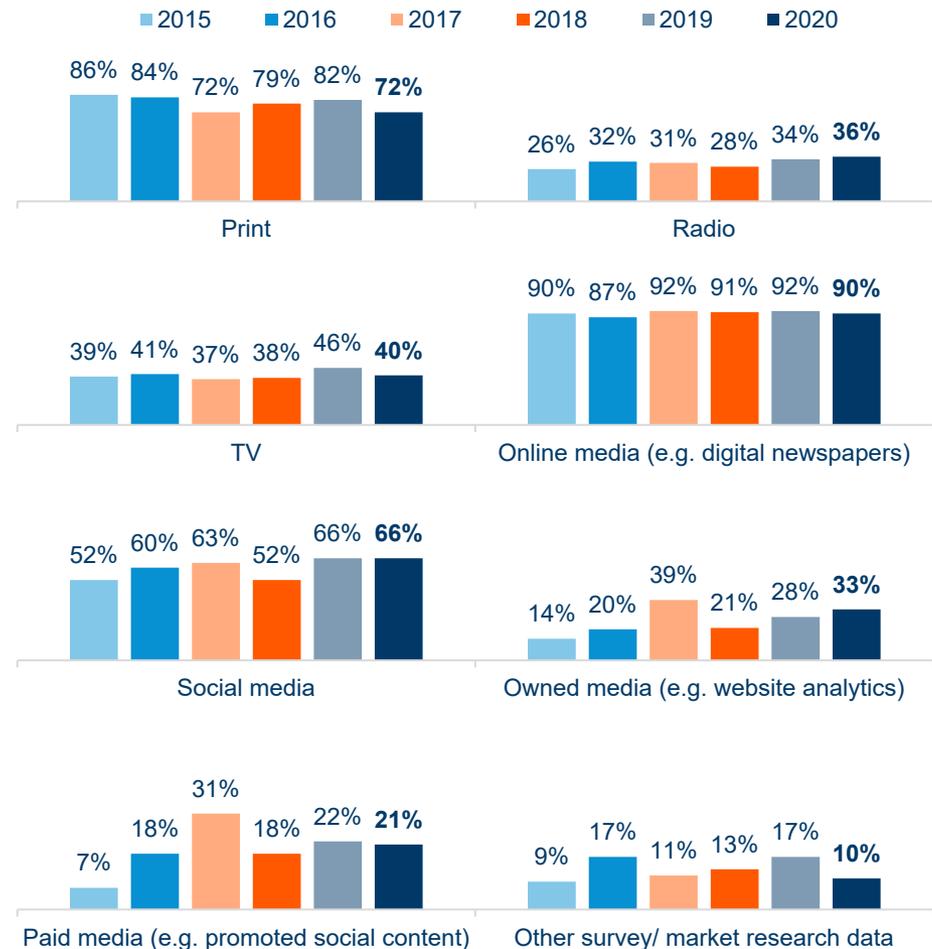
There has been little noteworthy change in the frequency with which clients and stakeholders include the different media channels in the scope of commissioned work, when compared with previous years. Nine in 10 members (90%) say **online media** such as digital newspapers are always/mostly included – a figure that's largely unchanged in the six years the survey has asked this question.

Print media are usually included in the scope of commissioned work by 72% of clients – matching the previous lowest level in 2018. Four in ten members say **TV** is typically included in the scope, while 36% report that **radio** is normally part of the spec – the highest proportion for radio in the six years since the question was first asked.

As in 2019, 66% say **social media** such as Facebook, Twitter and YouTube are normally part of the project scope, while 33% say this is the case for **owned media** such as website analytics. Around one in five (21%) say clients usually include **paid media** such as promoted social content.

Other survey and market research data are only included in the scope of client work on a regular basis for one in ten members.

Clients always/mostly include...



Q How frequently do your clients/ stakeholders include these in the scope of the work you carry out for them?

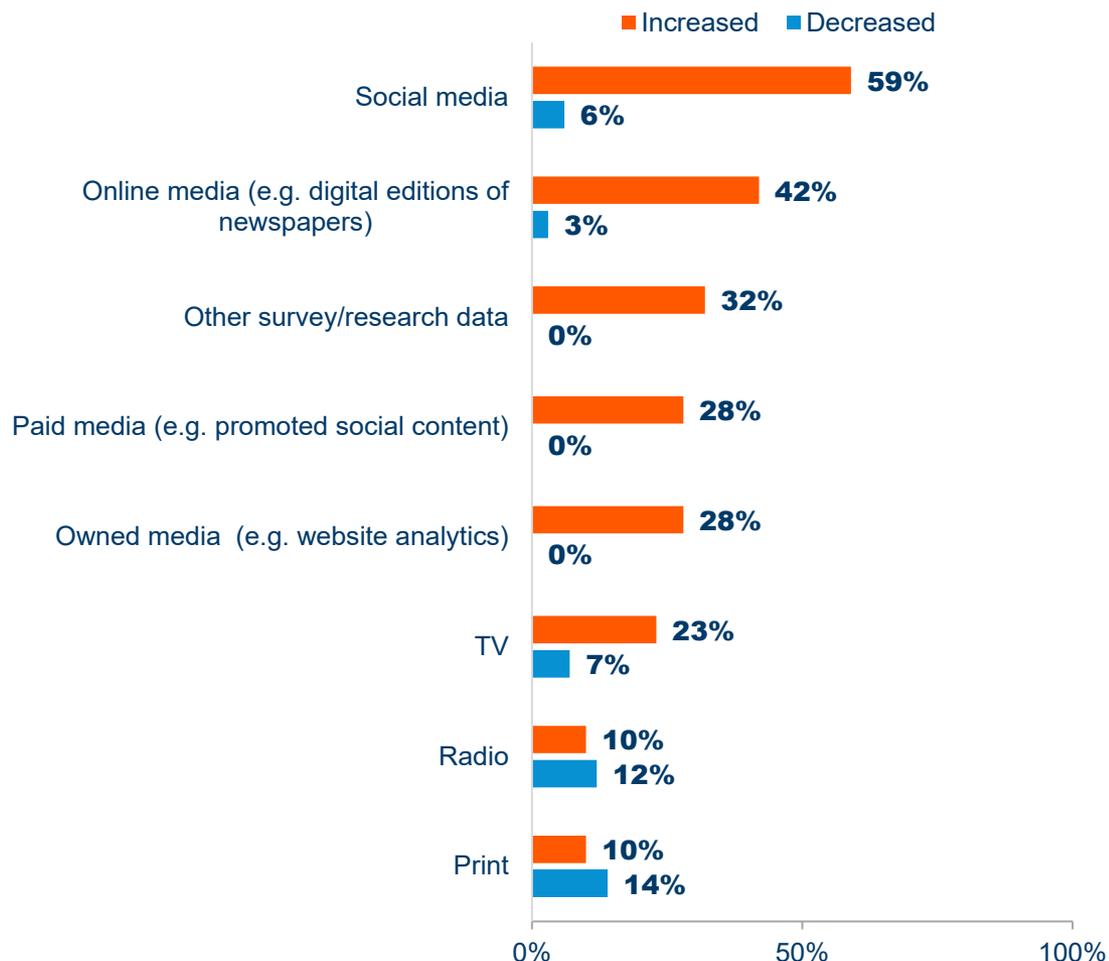
Base: All

Media channels – change in demand

In terms of actual change in demand observed by members, the channel where client requirements have increased most sharply in the past year is **social media**, where 59% report an increase, and just 6% a decrease.

More than two in five (42%) members report an increase in demand for measurement, evaluation and insights work which encompasses **online media**, while demand for the inclusion of **other survey and research data** has increased for 32% of members. With regard to both **paid media** and **owned media**, 28% of AMEC members say demand has increased in the past year.

Change in demand for measurement, evaluation and insights on the more traditional media channels is more of a mixed picture. Almost one in four members (23%) report an increase in work to measure and evaluate **TV** compared with just 7% saying demand has decreased. However, with both **radio** and **print** media, the proportion saying demand has declined is greater than the number saying it has increased.



Q For each of the following media channels, please indicate how client/stakeholder demand for measurement, evaluation and insights has changed in the past 12 months.

Base: All

Service mix

Members are also asked to indicate how frequently their client/ stakeholder service mix includes a number of different elements.

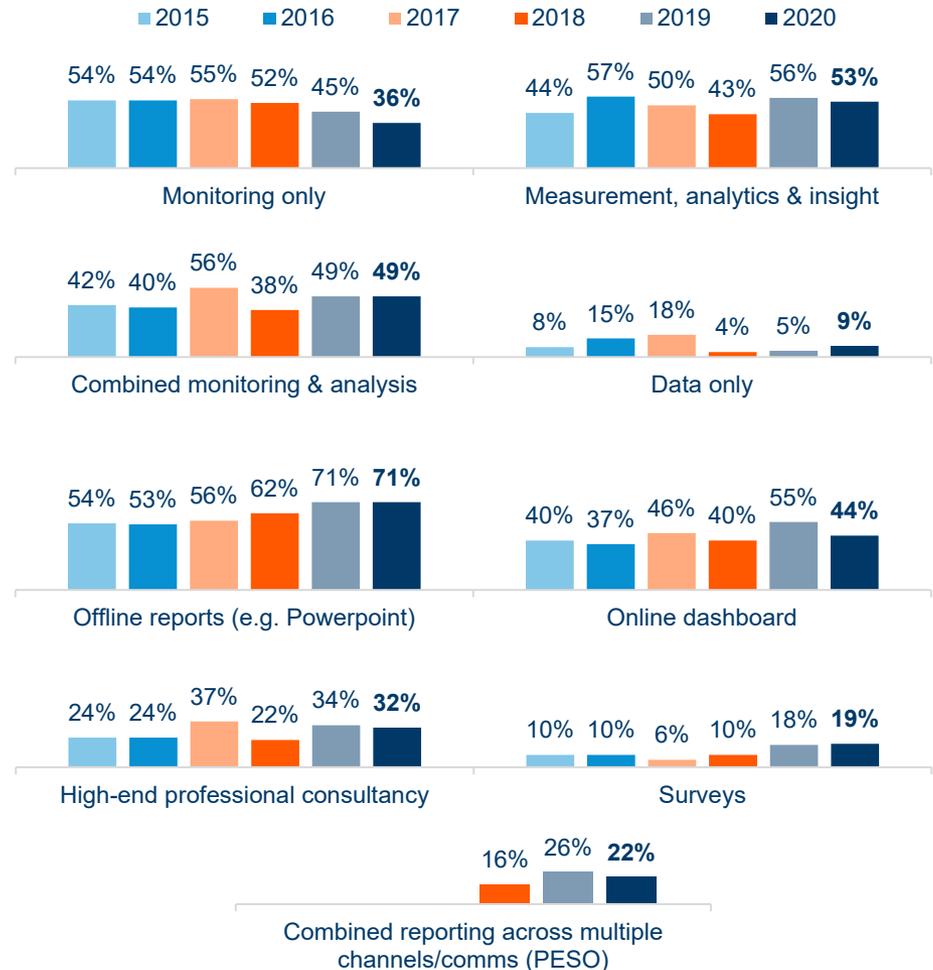
As in previous years, the most common component in the service mix is **offline reporting** (71%) in formats such as Word and Powerpoint. More than half (53%) say their service typically includes a full **measurement, analytics and insight** offer, in line with 56% last year. Almost half (49%) of clients usually receive a **combination of monitoring and analysis**.

AMEC members continue to report a decline in the number of clients who receive a **monitoring only** service. Now at 36%, this is down from 45% last year and a high of 55% in 2017.

The proportion offering **high-end professional consultancy** to most or all clients remains around one in three (32%), while provision of **online dashboards** slips back from 55% last year to 44% now.

Data only outputs (9%), **surveys** (19%) and **PESO reporting** (22%) remain relatively niche components in the service mix.

Clients always/mostly receive...



Q Thinking about your service mix, how often do your clients/stakeholders receive the following as part of the service provided?

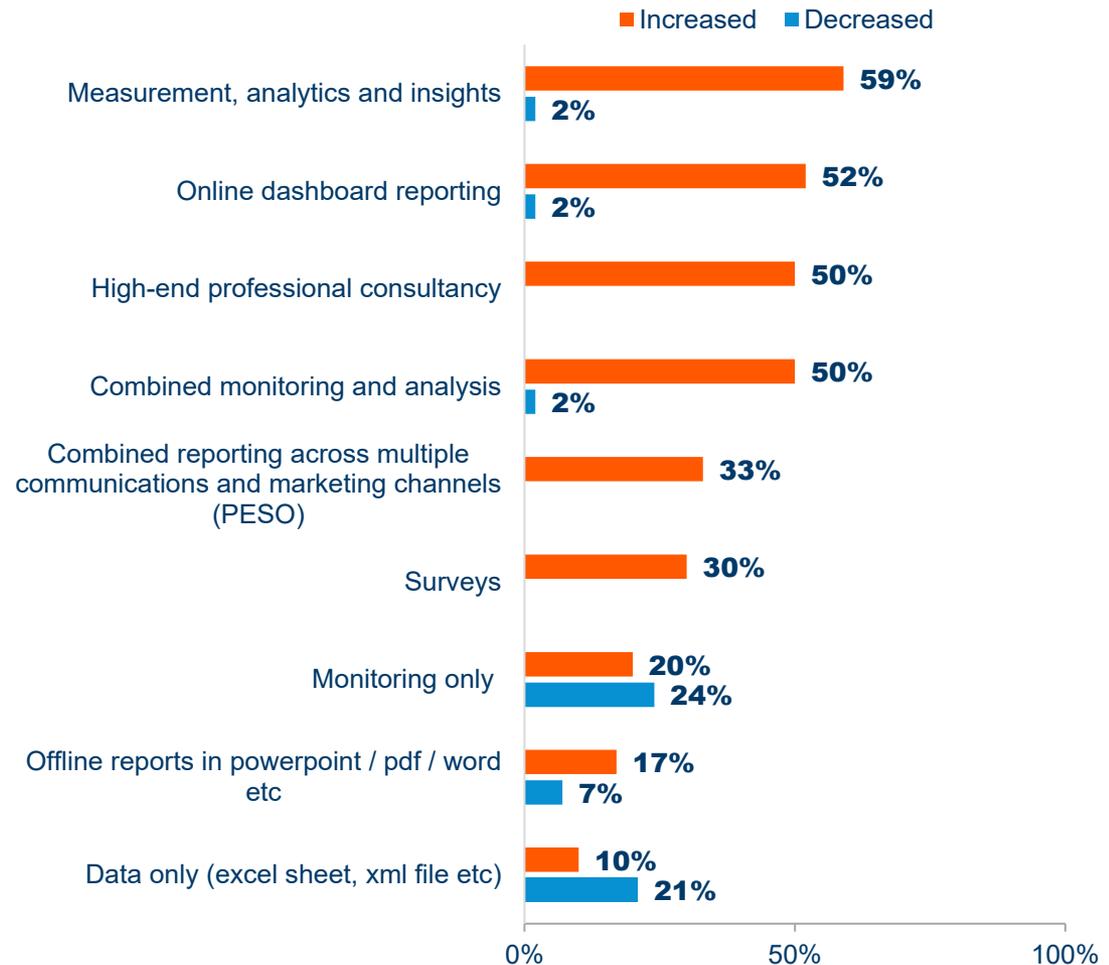
Base: All providing services all/partly based on internal resources

Service mix – change in demand

Overall demand for the different types of service is growing in a number of areas, according to members. Most notably, 59% report an increase in demand for a **measurement, analytics and insight** service. With 50% of members saying demand is up for **high-end professional consultancy**, it's clear that clients are looking for a greater depth and breadth of service going forwards.

Despite the dip in the number of client assignments where **online dashboards** are typically part of the output (see previous page), 52% of members say demand is growing in this area. In addition, 33% are seeing growing demand for **PESO reporting** and 30% say clients are asking for more **survey-based** services.

Meanwhile, members are more likely to be seeing a decrease in demand for **monitoring only** services (24%) than an increase (20%). Similarly, 21% say demand for **data only** output is declining, compared with just 10% reporting an increase.



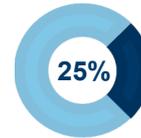
Q How has client/stakeholder demand for each of the following changed in the past year?

Base: All

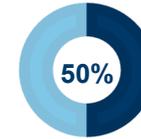
PR clients

When AMEC's PR consultancy members are asked about their clients' views of **how measurement, evaluation and insights fit in with the overall PR client service offer**, 25% say clients *always* or *often* demand measurement included as part of their brief.

In addition, half say measurement is very important in the mix, although not demanded by clients and 13% say it is moderately more important than other elements. Only 6% of PR consultancy members say measurement is no more important than other elements in the mix.



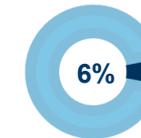
Clients always/often demand measurement in their pitch briefs



Very important element in the mix, but not demanded by clients



Moderately more important than other elements in the mix



No more important than other elements in the mix

Q From your clients' point of view, how important is your measurement, evaluation and insights offer as part of your overall PR client service mix?

Base: All PR members only

AMEC's role

AMEC's role as industry body



In a revised question about the value members place on different aspects of **AMEC's role as the industry body**, members evaluated a list of AMEC's functional activities as one of four levels of importance: *essential*; *very important*, but not essential; *important*, but of lower priority than those rated essential or very important; *not important*.

Members are most likely to feel **educating the PR marketplace about measurement, evaluation and insights** is an *essential* element in AMEC's role (75%), followed by the development of **industry-wide initiatives such as IEF** (72%) and **working with other trade associations to educate the market** (59%).

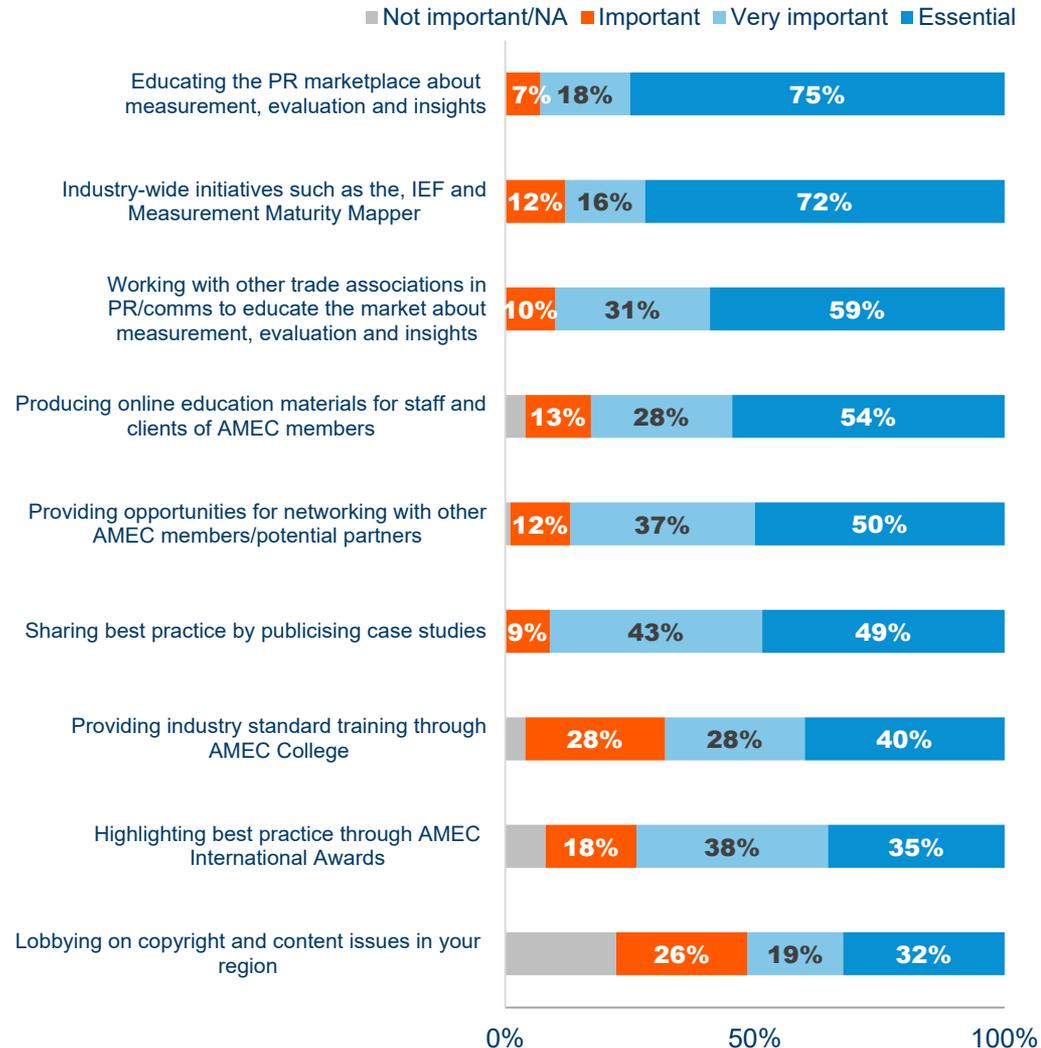
The **production of online educational materials** (54%) is seen as essential by more than half of members, while 50% think it is essential for AMEC to **provide networking opportunities for members and potential partners**, and 49% say **sharing best practice by publicising case studies** is *essential*.

Almost all (96%) members think **providing industry standard training through AMEC College** is at least important, including 40% who say this aspect of AMEC's role is *essential*, while 91% think **highlighting best practice through the International Awards programme** is important, including 35% *essential*.

Lobbying on copyright and content issues in the different global regions is least likely to be seen as important overall (77%), although one in three members (32%) do believe this aspect of AMEC's role is *essential*.

Q For each of the following functions and benefits provided by AMEC as your industry body, please indicate how important you feel it is for AMEC to prioritise each one

Base: All



Integrated Evaluation Framework (IEF)

The survey asks members to indicate how they are using **AMEC's Integrated Evaluation Framework (IEF)**.

Between the first year of measurement – 2018 – and last year's survey, usage of the tool for five of the six different purposes increased. This year, the extent to which IEF is used by members for the different purposes has levelled off or declined in most areas, although many members clearly still use the tool for a variety of business purposes.

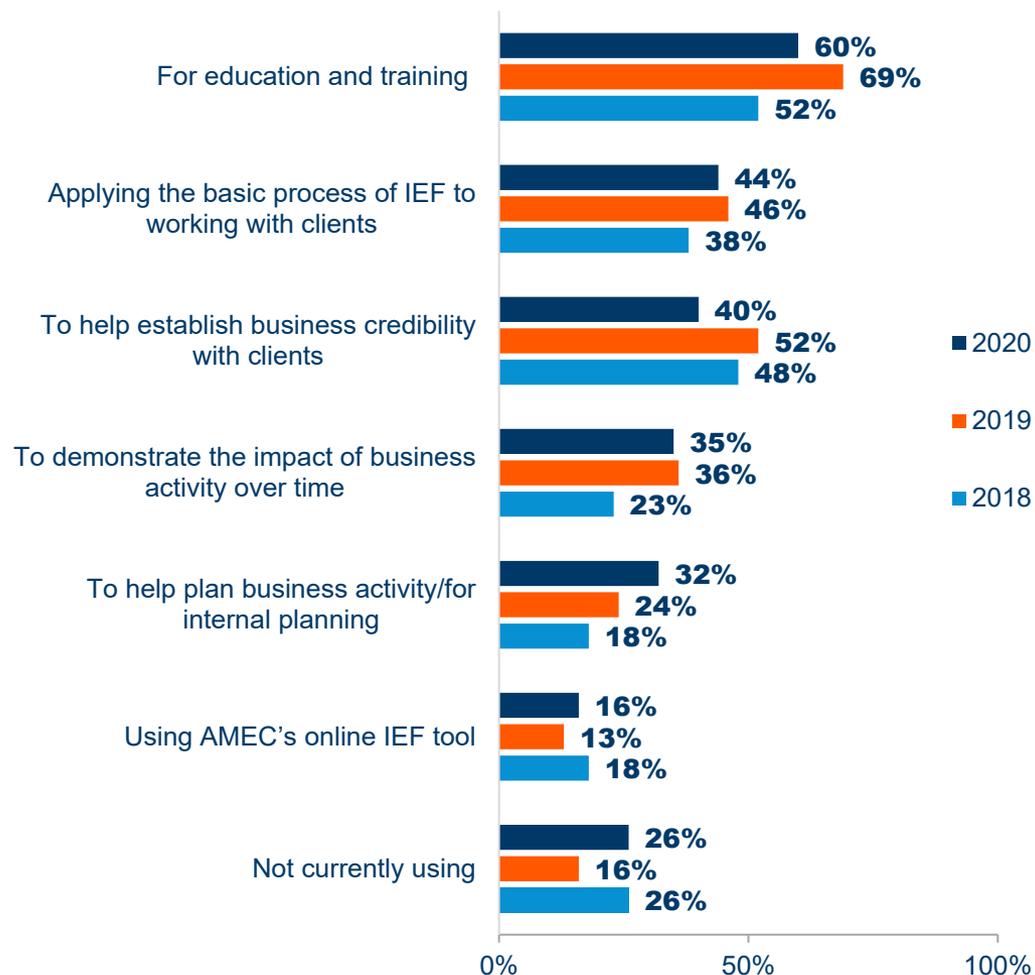
Members are most likely to use the tool **for education and training**, with 60% doing so this year, down from 69% in 2019, but above the 52% level reported in 2018.

As in 2019, more than four in ten (44%) use the **basic process of IEF in working with clients**. For 40%, IEF is used **to establish business credibility with clients**, although this is below the levels of usage reported in both previous years.

A third of members (35%) use the tool to **demonstrate the impact of business activity over time** – a similar proportion to last year. Meanwhile, the proportion using IEF **to help plan business activity** (32%) is higher than both previous years.

As in previous years, fewer than one in six (16%) use the **online IEF tool**.

The 26% of members not currently using IEF are divided between those who plan to use it in future (16%) and those with no plans to do so (10%).



Q Does your organisation use the AMEC Integrated Evaluation Framework (IEF) in any of the following ways?

Usefulness of IEF

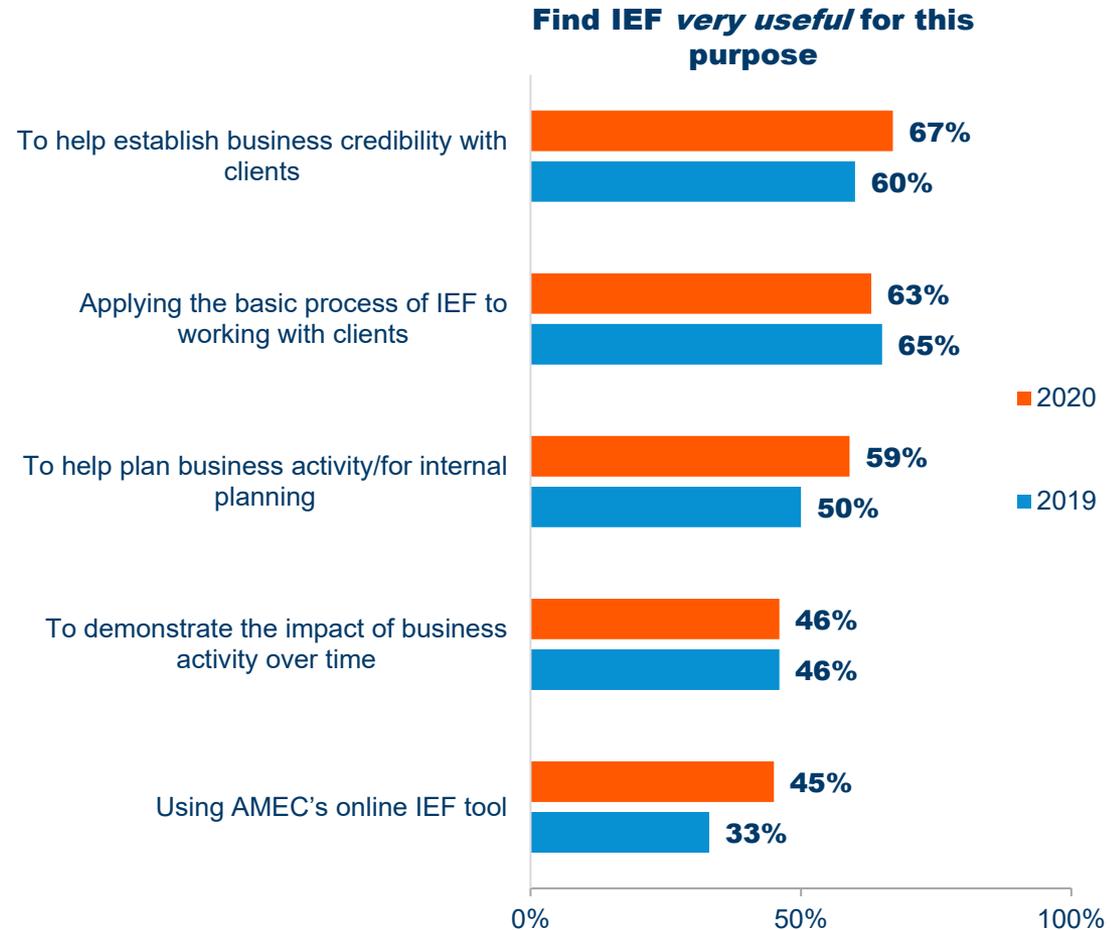
Members who use IEF for each of five purposes were asked to **rate the tool for its usefulness**. In most cases the tool is rated either *very useful* or *fairly useful*. The chart shows the proportion giving a *very useful* rating in each case, compared with the same measure in 2019.

Members are most likely to find IEF very useful **to help establish business credibility with clients** (67%) – a slightly higher proportion than last year (60%).

63% find the tool very useful for **the basic process of working with clients**, while 59% find it very useful to **help plan business activity** (up from 50% last year). As in 2019, 46% say the tool is very useful to **demonstrate the impact of business activity over time**.

Among the small number of members who use the **online IEF tool**, the proportion giving a very useful assessment is up from 33% last year to 45% in 2020.

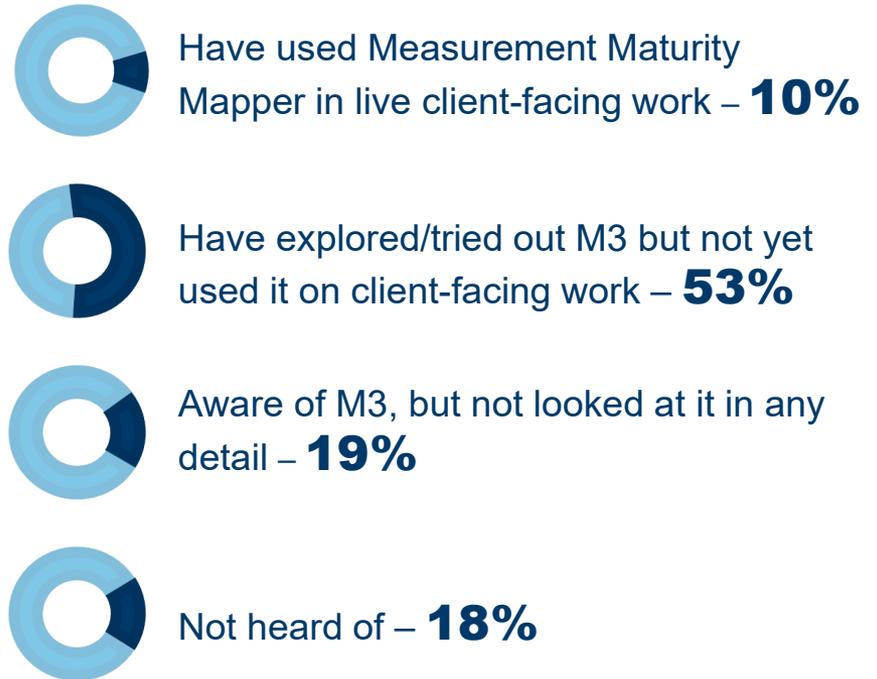
Q How useful do you find the IEF for each of these?
Base: All who say they use IEF for each purpose



Measurement Maturity Mapper

More than eight in ten members are aware of AMEC's **Measurement Maturity Mapper** tool. One in ten have used the tool in live client-facing work, while 53% have explored or tried out the tool without yet putting it into practice in a live client-facing environment. Of the remainder, 19% know about the tool but have yet to explore it in detail and 18% are not aware of it.

The proportion of members who have either used the tool with clients or tried it out totals 63% this year, up from 53% in 2019.

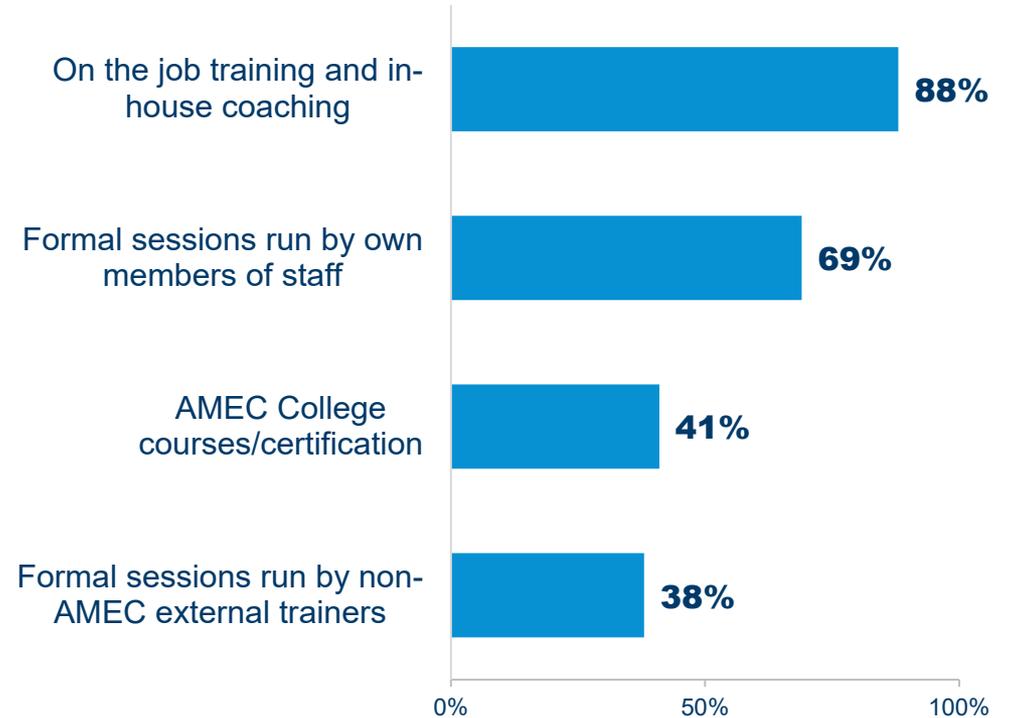


Q Which of the following best describes your organisation's awareness/use of Measurement Maturity Mapper?
Base: All members

Training

Two in five AMEC members (41%) **offer AMEC College courses/certification for staff members**, up from 28% in 2019. The proportion of members offering formal staff training sessions run by non-AMEC external providers is also higher this year – up from 31% in 2019 to 38% this time.

Meanwhile, the bulk of staff training is delivered on-the-job (88%) or through formal internal training sessions (69%).



Q Which of the following types of training do you provide for staff?

Base: All

THANK YOU FOR TAKING PART

For more information, please contact:
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