INSIGHTS & ANALYTICS MARKET & TOP 50 REPORT

U.S., 2021

PUBLISHED BY THE INSIGHTS ASSOCIATION; AUTHORED BY MICHAEL BRERETON OF MICHIGAN STATE UNIVERSITY WITH CONTRIBUTIONS FROM OUTSELL, INC., DIANE BOWERS, AND ESOMAR.
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The U.S. Full Service marketing research industry appeared to weather the economic shock of 2020 relatively well experiencing a 1% contraction compared to the overall U.S. market GDP contraction of 3.5%. The broader Insights & Analytics space experienced growth of about 4% during 2020. In addition to Full Service, this broader space includes emerging services such as social listening, self-service platforms and consulting.

These findings are based upon the analysis of the Insights Association annual Insights & Analytics Market Sizing Report. This study was redesigned last year to reflect the broadened definition of the Insights & Analytics market (vs. traditional marketing research) in which Insights Association members are increasingly participating.
CONTINUING WITH A NEW MEASUREMENT APPROACH

While a majority of industry leaders and associations appear to support the belief that a significant transformation of our industry is underway with emerging segments defining a morphing overall space, relatively little data exists today to understand this transformation and project such movement. The Top50 Report (formerly aka Honomichl) has long been the industry standard for annually documenting U.S. market sizing and patterns in the business of marketing research. But the Top50 study has traditionally focused on only the ‘Full Service’ research agency segment of the market. This definition of the market reflects only a limited portion of the broader market size assumed in a model of industry transformation.

In response, last year a collaborative effort between the Insights Association, ESOMAR, and the Master Of Science in Marketing Research Program at Michigan State University created a taxonomy for defining the broadened Insights & Analytics U.S. market. This new measurement construct includes the eight industry segments, as illustrated in Exhibit 1.

The total market included in this new Insights & Analytics taxonomy defines a substantially broadened space implying marketing research professionals may view themselves as impacting and competing in a far larger realm of market intelligence services. The Top50 Report traditionally defined the U.S. marketing research space as primarily Full Service agencies yielding about USD $16 billion in aggregate revenue. By comparison, this new Insights & Analytics definition yields a market measure of about USD $48 billion in revenue. The largest single segment is Full Service Research; but this new Insights & Analytics taxonomy additionally includes a much-expanded list of ‘insights’ activities such as information management/integration, curation, visualization and consulting. Also included are services such as panel access and online communities which were traditionally positioned by the Top50 Report as in support of, but not included in, the traditional marketing research space.

EXHIBIT 1 – 2020 MARKET SHARE BY SEGMENT

- Established Marketing Research
- Digital Data Analytics
- Industry Reports & Research
- Consulting Firms
- Social Listening & Communities
- Sample Panel Providers
- Self Service Platforms
- Enterprise Feedback Management
Experience One Powerful Verbatim Analytics Platform

Categorize open-ended comments quickly and easily, improving productivity.

<table>
<thead>
<tr>
<th>Industry-leading Verbatim Coding Management System</th>
<th>Text Analytics software quickly reveals top-level topic and sentiment analysis results in minutes.</th>
</tr>
</thead>
<tbody>
<tr>
<td>coder</td>
<td>Our experts deliver coding, text analysis and specialty services on-time, first time right.</td>
</tr>
<tr>
<td>cx inspector</td>
<td></td>
</tr>
<tr>
<td>illustrator</td>
<td></td>
</tr>
<tr>
<td>services</td>
<td></td>
</tr>
</tbody>
</table>

Serving the industry for over 20 years, Ascribe processes millions of comments each week and provides outstanding training and support.

“A client-first approach is at the core of the Ipsos/Ascribe relationship. They demonstrate great support, curiosity, and an entrepreneurial spirit to address our unique challenges.”

Jan Devenney, Ipsos, VP Operations, Data Processing and Coding

Contact us to discuss which Ascribe solution is best for you.
GoAscribe.com or 877.241.9112 x55
Following is the 2020 U.S. Market Revenue Leaders table applying this broadened Insights & Analytics definition. This table lists the 50 largest companies in this newly defined Insights & Analytics space based upon estimates of each company’s 2020 U.S. revenue (USD ‘000) aligned to the expanded list of ‘insights’ activities.

### EXHIBIT 2 - 2020 INSIGHTS & ANALYTICS U.S. MARKET REVENUE LEADERS TABLE

<table>
<thead>
<tr>
<th>Ranking</th>
<th>Industry Segment</th>
<th>Company</th>
<th>US Market 2020 ('000 USD)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Established Market Research</td>
<td>Nielsen</td>
<td>3,648,200</td>
</tr>
<tr>
<td>2</td>
<td>Industry Reports and Research</td>
<td>Gartner</td>
<td>2,541,630</td>
</tr>
<tr>
<td>3</td>
<td>Established Market Research</td>
<td>IQVIA</td>
<td>2,090,304</td>
</tr>
<tr>
<td>4</td>
<td>Digital Data Analytics</td>
<td>Salesforce.com</td>
<td>2,046,000</td>
</tr>
<tr>
<td>5</td>
<td>Digital Data Analytics</td>
<td>Adobe Systems</td>
<td>1,625,000</td>
</tr>
<tr>
<td>6</td>
<td>Industry Reports and Research</td>
<td>CoStar Group</td>
<td>1,576,068</td>
</tr>
<tr>
<td>7</td>
<td>Industry Reports and Research</td>
<td>IHS Markit</td>
<td>1,167,924</td>
</tr>
<tr>
<td>8</td>
<td>Established Market Research</td>
<td>IRI</td>
<td>1,000,000</td>
</tr>
<tr>
<td>9</td>
<td>Consulting Firms</td>
<td>Booz Allen Hamilton</td>
<td>914,780</td>
</tr>
<tr>
<td>10</td>
<td>Established Market Research</td>
<td>Ipsos</td>
<td>734,535</td>
</tr>
<tr>
<td>11</td>
<td>Digital Data Analytics</td>
<td>NICE</td>
<td>660,722</td>
</tr>
<tr>
<td>12</td>
<td>Consulting Firms</td>
<td>Deloitte</td>
<td>636,254</td>
</tr>
<tr>
<td>13</td>
<td>Established Market Research</td>
<td>Westat</td>
<td>570,000</td>
</tr>
<tr>
<td>14</td>
<td>Established Market Research</td>
<td>Kantar</td>
<td>557,360</td>
</tr>
<tr>
<td>15</td>
<td>Self-service Platforms</td>
<td>Qualtrics</td>
<td>552,221</td>
</tr>
<tr>
<td>16</td>
<td>Digital Data Analytics</td>
<td>HubSpot</td>
<td>538,646</td>
</tr>
<tr>
<td>17</td>
<td>Social Listening &amp; Communities</td>
<td>Cision</td>
<td>486,441</td>
</tr>
<tr>
<td>18</td>
<td>Sample Panel Providers</td>
<td>Dynata</td>
<td>431,852</td>
</tr>
<tr>
<td>19</td>
<td>Industry Reports and Research</td>
<td>Wood Mackenzie + PowerAdvocate (Verisk)</td>
<td>429,737</td>
</tr>
<tr>
<td>20</td>
<td>Established Market Research</td>
<td>Abt Associates</td>
<td>429,731</td>
</tr>
<tr>
<td>21</td>
<td>Consulting Firms</td>
<td>McKinsey &amp; Company</td>
<td>429,660</td>
</tr>
<tr>
<td>22</td>
<td>Established Market Research</td>
<td>AIR (American Institutes for Research)</td>
<td>418,848</td>
</tr>
<tr>
<td>23</td>
<td>Digital Data Analytics</td>
<td>LiveRamp</td>
<td>416,444</td>
</tr>
<tr>
<td>Ranking</td>
<td>Industry Segment</td>
<td>Company</td>
<td>US Market 2020 ('000 USD)</td>
</tr>
<tr>
<td>---------</td>
<td>----------------------------------------</td>
<td>------------------------------</td>
<td>---------------------------</td>
</tr>
<tr>
<td>24</td>
<td>Consulting Firms</td>
<td>Ernst &amp; Young</td>
<td>387,427</td>
</tr>
<tr>
<td>25</td>
<td>Industry Reports and Research</td>
<td>The NPD Group</td>
<td>376,908</td>
</tr>
<tr>
<td>26</td>
<td>Social Listening &amp; Communities</td>
<td>Gerson Lehrman Group</td>
<td>360,525</td>
</tr>
<tr>
<td>27</td>
<td>Industry Reports and Research</td>
<td>Forrester</td>
<td>354,710</td>
</tr>
<tr>
<td>28</td>
<td>Consulting Firms</td>
<td>Accenture</td>
<td>354,199</td>
</tr>
<tr>
<td>29</td>
<td>EFM (Enterprise Feedback Monitoring)</td>
<td>Medallia</td>
<td>348,371</td>
</tr>
<tr>
<td>30</td>
<td>Industry Reports and Research</td>
<td>RAND Corporation</td>
<td>346,000</td>
</tr>
<tr>
<td>31</td>
<td>Industry Reports and Research</td>
<td>JD Power</td>
<td>306,600</td>
</tr>
<tr>
<td>32</td>
<td>Digital Data Analytics</td>
<td>Neustar</td>
<td>293,513</td>
</tr>
<tr>
<td>33</td>
<td>Established Market Research</td>
<td>GfK</td>
<td>281,520</td>
</tr>
<tr>
<td>34</td>
<td>Consulting Firms</td>
<td>PwC</td>
<td>270,379</td>
</tr>
<tr>
<td>35</td>
<td>Digital Data Analytics</td>
<td>Oracle</td>
<td>268,980</td>
</tr>
<tr>
<td>36</td>
<td>Digital Data Analytics</td>
<td>Zeta Global</td>
<td>246,640</td>
</tr>
<tr>
<td>37</td>
<td>Digital Data Analytics</td>
<td>Sitecore</td>
<td>244,268</td>
</tr>
<tr>
<td>38</td>
<td>Self-service Platforms</td>
<td>Momentive (Survey Monkey)</td>
<td>244,147</td>
</tr>
<tr>
<td>39</td>
<td>Industry Reports and Research</td>
<td>IDC</td>
<td>235,400</td>
</tr>
<tr>
<td>40</td>
<td>Consulting Firms</td>
<td>KPMG</td>
<td>222,072</td>
</tr>
<tr>
<td>41</td>
<td>Consulting Firms</td>
<td>Boston Consulting Group</td>
<td>206,400</td>
</tr>
<tr>
<td>42</td>
<td>Social Listening &amp; Communities</td>
<td>Sprinklr</td>
<td>201,600</td>
</tr>
<tr>
<td>43</td>
<td>Social Listening &amp; Communities</td>
<td>Meltwater Group</td>
<td>198,770</td>
</tr>
<tr>
<td>44</td>
<td>Consulting Firms</td>
<td>Bain &amp; Company</td>
<td>192,640</td>
</tr>
<tr>
<td>45</td>
<td>Sample Panel Providers</td>
<td>Prodege</td>
<td>175,000</td>
</tr>
<tr>
<td>46</td>
<td>Sample Panel Providers</td>
<td>Numerator</td>
<td>159,950</td>
</tr>
<tr>
<td>47</td>
<td>Industry Reports and Research</td>
<td>Ascential</td>
<td>157,550</td>
</tr>
<tr>
<td>48</td>
<td>Social Listening &amp; Communities</td>
<td>Khoros (Spredfast+Lithium)</td>
<td>149,100</td>
</tr>
<tr>
<td>49</td>
<td>EFM (Enterprise Feedback Monitoring)</td>
<td>Verint Systems</td>
<td>146,124</td>
</tr>
<tr>
<td>50</td>
<td>EFM (Enterprise Feedback Monitoring)</td>
<td>InMoment (MaritzCX)</td>
<td>142,560</td>
</tr>
</tbody>
</table>
To help further illustrate this expanded market definition approach, following is a separate listing of companies included in each of the eight segments, ranked by their size as indicated in the preceding 2020 U.S. Market Insights & Analytics Revenue Leaders Table.

**EXHIBIT 3 – HIGHEST REVENUE COMPANIES BY SEGMENT**

### SEGMENT: ESTABLISHED MARKETING RESEARCH

**2020 U.S. MARKET REVENUE**

<table>
<thead>
<tr>
<th>Company</th>
<th>‘000 USD</th>
</tr>
</thead>
<tbody>
<tr>
<td>Nielsen</td>
<td>$3,648,200</td>
</tr>
<tr>
<td>IQVIA</td>
<td>$2,090,304</td>
</tr>
<tr>
<td>IRi</td>
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<tr>
<td>American Institutes for Research (AIR)</td>
<td>$418,848</td>
</tr>
<tr>
<td>GfK</td>
<td>$281,520</td>
</tr>
<tr>
<td>Estimated Balance of Segment</td>
<td>$8,119,479</td>
</tr>
<tr>
<td><strong>Total Segment</strong></td>
<td><strong>$17,849,977</strong></td>
</tr>
</tbody>
</table>

### SEGMENT: INDUSTRY REPORTS & RESEARCH

**2020 U.S. MARKET REVENUE**

<table>
<thead>
<tr>
<th>Company</th>
<th>‘000 USD</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gartner</td>
<td>$2,541,630</td>
</tr>
<tr>
<td>CoStar Group</td>
<td>$1,576,068</td>
</tr>
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<td>IHS Markit</td>
<td>$1,167,924</td>
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<td>Wood Mackenzie (Verisk)</td>
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<tr>
<td>Forrester</td>
<td>$354,710</td>
</tr>
<tr>
<td>RAND Corporation</td>
<td>$346,000</td>
</tr>
<tr>
<td>JD Power</td>
<td>$306,600</td>
</tr>
<tr>
<td>IDC</td>
<td>$235,400</td>
</tr>
<tr>
<td>Ascential</td>
<td>$157,550</td>
</tr>
<tr>
<td>Estimated Balance of Segment</td>
<td>$393,613</td>
</tr>
<tr>
<td><strong>Total Segment</strong></td>
<td><strong>$7,886,140</strong></td>
</tr>
</tbody>
</table>

### SEGMENT: SAMPLE PANEL PROVIDERS

**2020 U.S. MARKET REVENUE**

<table>
<thead>
<tr>
<th>Company</th>
<th>‘000 USD</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dynata</td>
<td>$431,852</td>
</tr>
<tr>
<td>Prodege</td>
<td>$175,000</td>
</tr>
<tr>
<td>Numerator</td>
<td>$159,950</td>
</tr>
<tr>
<td>Estimated Balance of Segment</td>
<td>$131,353</td>
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<tr>
<td><strong>Total Segment</strong></td>
<td><strong>$898,155</strong></td>
</tr>
</tbody>
</table>

### SEGMENT: SELF-SERVICE PLATFORMS

**2020 U.S. MARKET REVENUE**

<table>
<thead>
<tr>
<th>Company</th>
<th>‘000 USD</th>
</tr>
</thead>
<tbody>
<tr>
<td>Qualtrics</td>
<td>$552,221</td>
</tr>
<tr>
<td>Momentive</td>
<td>$244,147</td>
</tr>
<tr>
<td>Estimated Balance of Segment</td>
<td>$195,119</td>
</tr>
<tr>
<td><strong>Total Segment</strong></td>
<td><strong>$991,487</strong></td>
</tr>
</tbody>
</table>
### SEGMENT: SOCIAL LISTENING & COMMUNITIES
#### 2020 US MARKET REVENUE

<table>
<thead>
<tr>
<th>Company</th>
<th>’000 USD</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cision</td>
<td>$486,441</td>
</tr>
<tr>
<td>GLG</td>
<td>$360,525</td>
</tr>
<tr>
<td>Sprinklr</td>
<td>$201,600</td>
</tr>
<tr>
<td>Meltwater Group</td>
<td>$198,770</td>
</tr>
<tr>
<td>Khoros</td>
<td>$149,100</td>
</tr>
<tr>
<td>Estimated Balance of Segment</td>
<td>$2,133,571</td>
</tr>
<tr>
<td><strong>Total Segment</strong></td>
<td><strong>$3,530,007</strong></td>
</tr>
</tbody>
</table>

### SEGMENT: DIGITAL DATA ANALYTICS
#### 2020 US MARKET REVENUE

<table>
<thead>
<tr>
<th>Company</th>
<th>’000 USD</th>
</tr>
</thead>
<tbody>
<tr>
<td>Salesforce.com</td>
<td>$2,046,000</td>
</tr>
<tr>
<td>Adobe Systems</td>
<td>$1,625,000</td>
</tr>
<tr>
<td>NICE</td>
<td>$660,722</td>
</tr>
<tr>
<td>HubSpot</td>
<td>$538,646</td>
</tr>
<tr>
<td>LiveRamp</td>
<td>$416,444</td>
</tr>
<tr>
<td>Neustar</td>
<td>$293,513</td>
</tr>
<tr>
<td>Oracle</td>
<td>$268,980</td>
</tr>
<tr>
<td>Zeta Global</td>
<td>$246,640</td>
</tr>
<tr>
<td>Sitecore</td>
<td>$244,268</td>
</tr>
<tr>
<td>Estimated Balance of Segment</td>
<td>$3,915,992</td>
</tr>
<tr>
<td><strong>Total Segment</strong></td>
<td><strong>$10,256,206</strong></td>
</tr>
</tbody>
</table>

### SEGMENT: ENTERPRISE FEEDBACK MANAGEMENT
#### 2020 US MARKET REVENUE

<table>
<thead>
<tr>
<th>Company</th>
<th>’000 USD</th>
</tr>
</thead>
<tbody>
<tr>
<td>Medallia</td>
<td>$348,371</td>
</tr>
<tr>
<td>Verint Systems</td>
<td>$146,124</td>
</tr>
<tr>
<td>InMoment(MaritzCX)</td>
<td>$142,560</td>
</tr>
<tr>
<td>Estimated Balance of Segment</td>
<td>$505,444</td>
</tr>
<tr>
<td><strong>Total Segment</strong></td>
<td><strong>$1,142,499</strong></td>
</tr>
</tbody>
</table>

### SEGMENT: CONSULTING FIRMS
#### 2020 US MARKET REVENUE

<table>
<thead>
<tr>
<th>Company</th>
<th>’000 USD</th>
</tr>
</thead>
<tbody>
<tr>
<td>Booz Allen Hamilton</td>
<td>$914,780</td>
</tr>
<tr>
<td>Deloitte</td>
<td>$636,254</td>
</tr>
<tr>
<td>McKinsey &amp; Co</td>
<td>$429,660</td>
</tr>
<tr>
<td>Ernst &amp; Young</td>
<td>$387,427</td>
</tr>
<tr>
<td>Accenture</td>
<td>$354,199</td>
</tr>
<tr>
<td>PwC</td>
<td>$270,379</td>
</tr>
<tr>
<td>KPMG</td>
<td>$222,072</td>
</tr>
<tr>
<td>BCG</td>
<td>$206,400</td>
</tr>
<tr>
<td>Bain &amp; Company</td>
<td>$192,640</td>
</tr>
<tr>
<td>Estimated Balance of Segment</td>
<td>$1,837,440</td>
</tr>
<tr>
<td><strong>Total Segment</strong></td>
<td><strong>$5,451,251</strong></td>
</tr>
</tbody>
</table>
The continued expansion of the U.S. Insights & Analytics market during 2020 once again supports the phenomenon of U.S. businesses’ ever-increasing demand for customer-focused, fact-based decision-making capabilities. Despite widespread business disruption during 2020, the demand for Insights & Analytics services increased 3.8% as indicated in Exhibit 4. This compares to the more robust growth rates of 8% and nearly 7% experienced in prior years, but it still represents an impressive outcome considering the overall U.S. market GDP contracted 3.5% during 2020.

### EXHIBIT 4 - YOY CHANGE BY SEGMENT

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Established Marketing Research</td>
<td>$17,550,745</td>
<td>41%</td>
<td>$18,066,778</td>
<td>39%</td>
<td>2.9%</td>
<td>$17,849,977</td>
<td>37%</td>
<td>-1.2%</td>
</tr>
<tr>
<td>Industry Reports &amp; Research</td>
<td>$7,523,699</td>
<td>18%</td>
<td>$8,237,192</td>
<td>18%</td>
<td>9.5%</td>
<td>$7,886,140</td>
<td>16%</td>
<td>-4.3%</td>
</tr>
<tr>
<td>Sample Panel Providers</td>
<td>$722,756</td>
<td>2%</td>
<td>$781,432</td>
<td>2%</td>
<td>8.1%</td>
<td>$898,155</td>
<td>2%</td>
<td>14.9%</td>
</tr>
<tr>
<td>Self Service Platforms</td>
<td>$677,747</td>
<td>2%</td>
<td>$732,533</td>
<td>2%</td>
<td>8.1%</td>
<td>$991,487</td>
<td>2%</td>
<td>35.4%</td>
</tr>
<tr>
<td>Enterprise Feedback Management</td>
<td>$760,868</td>
<td>2%</td>
<td>$938,012</td>
<td>2%</td>
<td>23.3%</td>
<td>$1,142,499</td>
<td>2%</td>
<td>21.8%</td>
</tr>
<tr>
<td>Digital Data Analytics</td>
<td>$8,539,152</td>
<td>20%</td>
<td>$9,676,632</td>
<td>21%</td>
<td>13.3%</td>
<td>$10,256,206</td>
<td>21%</td>
<td>6.0%</td>
</tr>
<tr>
<td>Social Listening &amp; Communities</td>
<td>$2,925,557</td>
<td>7%</td>
<td>$3,315,264</td>
<td>7%</td>
<td>13.3%</td>
<td>$3,530,007</td>
<td>7%</td>
<td>6.5%</td>
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<tr>
<td>Consulting Firms</td>
<td>$4,100,724</td>
<td>10%</td>
<td>$4,496,863</td>
<td>10%</td>
<td>9.7%</td>
<td>$5,451,251</td>
<td>11%</td>
<td>21.2%</td>
</tr>
<tr>
<td>Total</td>
<td>$42,801,249</td>
<td>100%</td>
<td>$46,244,706</td>
<td>100%</td>
<td>8.0%</td>
<td>$48,005,721</td>
<td>100%</td>
<td>3.8%</td>
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A closer look at these segments within the U.S. Insights & Analytics market reveals that 2020 growth was not distributed evenly across the various disciplines that comprise this broad view of the market. As illustrated in Exhibit 4, trends in relative share and YOY growth indicate the Established Marketing Research segment (aka Traditional Full Service), along with its similar ‘traditional’ segment Industry Reports & Research, are not benefiting from the broad Insights & Analytics expansion of activity experienced by other segments.

These trends reinforce the argument building in recent years that U.S. businesses are demonstrating an ever-increasing demand for customer-focused, fact-based decision-making capabilities. But a decreasing share of this activity is being delivered as ‘marketing research’ studies by professionals traditionally calling themselves ‘marketing researchers’.

By contrast, consistent substantial YOY growth in …

- Self-Service Platforms
- Enterprise Feedback Management
- Digital Data Analytics
- Social Listening & Communities

… support the much-observed trends of …

- Insights tasks increasingly being completed by brand’s internal resources rather than ‘farmed out’ to external agencies
- Insights tasks increasingly being completed internally by non-researchers with user-intuitive tools
- ‘Roughly right’ and speed of insights being prioritized over precision and depth

… and also indicate the industry’s overall expansion is increasingly reliant upon the …

- the application of technology-enabled subscription ‘platforms’
- listening to existing (social media) customer voice rather than gathering bespoke ‘asking’ customer voice
- quick, agile, cost-effective techniques

---

Don’t sacrifice quality for cost.

The SSRS Opinion Panel is a nationally representative probability-based panel of U.S. adults, recruited through Address Based Sampling – data you can trust at a price you can afford.

Don’t sacrifice speed for quality.

The SSRS Text Message Panel is a nationally representative TCPA compliant probability-based panel of U.S. adults who are willing to respond to surveys by text – fast responses from real people.

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Although the Established Marketing Research segment is contracting amid growth in other industry disciplines, at 37% share it continues to represent the largest portion of the Insights & Analytics market. The historical Top50 Report (formerly aka Honomichl) was once again conducted this year to offer an in-depth understanding of this particular segment.

Exhibit 5 is the Insights Association Top50 (formerly aka Honomichl) industry ranking based upon 2020 U.S. revenue. Over the years this full Top50 study has evolved to include several companies from outside the traditional Full Service marketing research segment, but this listing continues to represent the closest available representation of the Insights Association membership.

The aggregate U.S. revenue for these 50 companies during 2020 was $15.2 billion. An `all other` adjustment of $432 million, which represents the 194 Insights Association membership companies not included in the Top50 listing, has been added to best approximate the traditional addressable market for Insights Association members.

Despite the widespread disruption felt by U.S. businesses in 2020, the anecdotal information shared by Insights Association members during 2020 seemed to indicate that U.S. marketing research agencies in general were avoiding severe negative business impact. There was much discussion during 2020 in industry blogs and webinars regarding brands` continuing need to understand market dynamics, a `wait & see` inclination among brands before terminating studies and partnerships, and a robust second half offsetting a weak first-half. The data now confirm this with the full listing of companies included in the traditional Top50 data collection process experiencing roughly flat U.S. market revenue performance when comparing 2020 to 2019. This compares to the overall U.S. market GDP impact of -3.5%.

As previously mentioned, over the years this full Top50 listing has evolved to include several companies from outside the traditional Full Service marketing research segment. So a subset of only Full Service companies was analyzed separately to understand the 2020 economic impact more accurately on this core group of Insights Association members. This analysis revealed a contraction of approximately 1%, reinforcing the earlier indicated 1.2% contraction of the Established Marketing Research segment – i.e. the most comparable segment in the newly defined Insights & Analytics taxonomy.

Also significant is that recent studies probing industry leaders` perspective on the prospects for a rebound indicate a strong turnaround in 2021 and 2022. For instance, the most recent Insights Association COVID-19 Member Survey (May 2021) indicated for the first time in a year a majority of respondents are no longer somewhat or very concerned about the future outlook. In this study, 65% of agencies and 92% of corporate members reported their work pipelines are back to where they were, or better, than pre-COVID-19.

This contrasts with the impact felt by our industry during the last major economic disruption – the Great Recession of 2008-2009. In 2009 the Top50 aggregate revenue contracted 3.5% while the overall U.S. market GDP contracted only 2.5%. It took several years for the marketing research industry to consistently return to its traditional growth rate of about 4%.

The Established Marketing Research segment in the newly defined Insights & Analytics taxonomy best approximates the Traditional Full Service marketing research segment measured in previous years. In this report, however, the aggregate 2020 revenue for these two is different; Traditional Full Service = $15.6 billion, Established Marketing Research = $17.8 billion. The difference can be explained by the included `all other` calculations. The Established Marketing Research `all other` attempts to approximate all companies in this segment, while the Traditional Full Service definition attempts to approximate only those companies in the Insights Association membership.
THE PILLARS OF MEMBER VALUE

PROTECT
Protect the industry from restrictive regulation, deficient practice, and nefarious practitioners.
- IA Code of Standards
- Privacy for America
- ISO Contributions
- U.S. Census Coalition

CONNECT
The hub of the Insights community – opportunities to build peer relationships and resources in person and online.
- On-Site & Virtual Conferences
- Chapter/Local Events
- Online Forums & Career Center
- International Programs

INFORM
Deliver best-in-class learning events, publications, training, news, and thought leadership.
- Conferences & Webinars
- Legislative Alerts
- Benchmarking Surveys
- Legal & Privacy Officers Forum
- Exclusive Publications & Resources

PROMOTE
Promote the industry and its members to enable business growth and evolution.
- Seals & Certifications
- Blue Book Resource Directory
- Media & Business Organization Outreach
- National & International Partnerships

www.insightsassociation.org
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<tr>
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<td>iriworldwide.com</td>
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<td>jdpower.com</td>
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<td>2016</td>
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<td>$103.0</td>
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<td>Horsham, PA</td>
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<td>Bellomy*</td>
<td>Winston-Salem, NC</td>
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<td>bellomy.com</td>
<td>$15.5</td>
<td>-18.4%</td>
<td>$0.0</td>
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</tbody>
</table>

Cumulative Totals for the Top50:
- $15,192.1, 0.4% of $16,740.5, 52.4% of $31,932.6, 51,442, $15,130.6, 0.4% of $17,123.9, 51.8% of $32,254.5

All Other Insights Association Research Company Members (194 companies not included in the Top 50)
- $432.0, -8.9% of $33.0, 7.1% of $465.0, 1,800, $474.0, 7.1% of $39.0, $513.0

Total***
- $15,624.1, 0.1% of $16,773.5, 51.8% of $32,397.6, 53,242, $15,604.6, 0.1% of $17,162.9, 52.4% of $32,767.5

* "% Change" calculation reflects adjustment of previously reported 2019 U.S. Research Revenue due to acquisition/divestiture activity or other business change during 2020

** Some or all figures are not available so instead are based upon research and estimation by the Report author

*** The Total shown for the Historical Top 50 represents the market as established by the Honomichl and Diane Bowers report, and maintained to ensure comparability, but is a slightly different market than the Outsell Established Market Research segment.

-- "This company did not participate in last year’s Top 50 Report

rev. 8/15/2021
Eight of the 10 largest companies during 2019 (based upon U.S. revenue) returned once again to the top 10 ranking for 2020. Nielsen, IQVIA and Gartner once again hold the top 3 positions. Comscore and GfK moved out of this top 10 group for 2020, landing at #11 and #12 respectively. They were replaced by Concentrix, moving up to #5 from #22 in 2019, and ICF, moving up to #9 from #13 in 2019.

The YOY movement of Concentrix was primarily driven by the restatement of revenue after a 2020 spin-off from holding company SYNNEX Corp to become an independent publicly held company. Concentrix was formed through acquisitions of large customer experience measurement and management solution companies such as Minacs and Convergys.

The YOY movement of ICF was primarily driven by the restatement of revenue after the 2020 reclassification of services that would be considered eligible for consideration in the Top50 process. ICF is a global consulting company that provides a range of services including marketing research.

Three firms were added to the Top50 listing for 2020 after not participating in 2019. Gallup is ranked #15 after many years of not being included in the Top50 annual process. PSB Insights has been added for 2020 and achieved the rank of #24. And Deloitte Brand Operations Services, formed through the acquisition of LRA Worldwide, has been added at the rank of #39.

These replace Screen Engine/ASI, NRC Health and RTi. These three firms participated in 2019 but elected to not be included for 2020.

The upward adjustments for Concentrix and ICF, combined with the net effect of the 2020 added/deleted companies, had a non-performance adjustment effect of about 2 ranking positions on most companies. Allowing for this effect we can see that, even though there were varying degrees of growth or contraction among companies, most maintained their relative positioning in the listing. This is supported by the fact that 14 companies dropped two positions, and a total of 40 firms were either unchanged or moved downward one, two or three spots.
In Summary

Domestic Insights and Data Analytics revenue totaled approximately USD$48 billion in 2020 – growing about 4% – remarkable considering overall U.S. GDP contracted 3.5% in an economy impacted by the global pandemic. This impressive performance was thanks to double-digit increases posted by companies operating in three sectors: Self Service Platforms (35.4% growth), Enterprise Feedback Management (21.8%) and Consulting (21.2%). Companies operating in Data Analytics (6% growth) and Social Listening & Communities (6.5% growth) also helped buoy the market. The more traditional players in the space, defined as “Established Marketing Research” agencies and providers of “Industry Reports & Research”, posted revenue loss of 1.2% and 4.3% respectively in 2020. Combined, these two segments make up just over half of the total Insights & Analytics marketplace tracked in this study. Indications are that 2021 may represent a recovery for lagging sectors, and continued growth for others, as leaders report strong pipelines, though with a challenged labor market. The Insights Association, working with MSU and its global partners, is already looking forward to presenting 2021 data in the summer of 2022.

ABOUT THE AUTHOR

Michael Brereton has a passion for understanding, and playing a leadership role in, the transformation of the marketing research industry. In 2014 he retired from Maritz Research after twenty-seven years with the company, the most recent eleven years as President and CEO.

Michael is currently with the Master of Science in Marketing Research Program (MSMR) at Michigan State University’s Eli Broad College of Business. The MSMR Program was created to develop the next generation of leadership for the rapidly evolving insights & analytics space. The MSMR Program is consistently ranked as the #1 Master’s Program in Marketing Research in North America.
Nielsen is a global measurement and data analytics company that provides a complete and trusted view of consumers and markets worldwide. By connecting clients to audiences, we fuel the media industry with the most accurate understanding of what people listen to and watch. To discover what audiences love, we measure data across all channels and platforms—from podcasts, streaming TV to social media. When companies and advertisers are truly connected to their audiences, they can target the most important opportunities and ultimately accelerate growth.

Nielsen is divided into two business units: Nielsen Global Media and Nielsen Global Connect.

Nielsen Global Media provides media and advertising clients with unbiased and reliable metrics that create the shared understanding of the industry required for markets to function, enabling its clients to grow and succeed across the $600 billion global advertising market. Nielsen Global Media helps clients define exactly who they want to reach, concurrently optimizing the outcomes they can achieve. The company’s cross-platform measurement strategy brings together the best of TV and digital measurement to ensure a more functional marketplace for the industry.

Nielsen Global Connect not only provides consumer packaged goods manufacturers and retailers with accurate, actionable information, but a complete picture of the complex and changing marketplace that enables brands to innovate and grow their businesses.

Nielsen Global Connect provides data and builds tools that use predictive models to turn observations in the marketplace into business decisions and winning solutions.

In March 2021, NielsenIQ (formerly Nielsen Global Connect) was sold to affiliates of Advent International.

* % Change* calculation reflects adjustment of previously reported 2019 U.S. research revenue due to acquisition/divestiture activity or other business change during 2020.

IQVIA is a global provider of information, innovative technology solutions and contract research services focused on helping healthcare clients find better solutions for patients. Formed through the 2016 merger of Quintiles and IMS Health, IQVIA applies human data science – leveraging the analytic rigor and clarity of data science to an ever-expanding scope of human science that enables companies to reimagine and develop new approaches to clinical development and commercialization, speed innovation, and accelerate improvements in healthcare outcomes.

IQVIA has three operating segments: Technology & Analytics
Solutions, Research & Development Solutions, and Contract Sales & Medical Solutions. For purposes of this report on the research and data analytics industry, only the revenue from the Technology & Analytics Solutions segment has been included.

Powered by the IQVIA CORE™, we deliver unique and actionable insights at the intersection of large scale analytics, transformative technology and extensive domain expertise, as well as execution capabilities to help biotech, medical device, pharmaceutical companies, medical researchers, government agencies, and other healthcare stakeholders tap into a deeper understanding of diseases, human behaviors and scientific advances, in an effort to advance their path toward cures.

IQVIA has one of the largest and most comprehensive collections of healthcare information in the world, which includes more than 800 million comprehensive, longitudinal, non-identified patient records spanning sales, prescription and promotional data, medical claims, electronic medical records, genomics, and even social media. Our scaled and growing information set contains over 35 petabytes of proprietary data sourced from more than 150,000 data suppliers and covering over one million data feeds globally. Based on this data, we deliver information and insights on over 85% of the world’s pharmaceuticals, helping our clients run their organizations more efficiently and make better decisions to improve their clinical, commercial and financial performance.

* '% Change' calculation reflects adjustment of previously reported 2019 U.S. research revenue due to acquisition/divestiture activity or other business change during 2020.

Gartner Research delivers independent, objective advice to leaders across an enterprise through subscription services that include on-demand access to published research content, data and benchmarks, and direct access to a network of approximately 2,300 research experts located around the globe. Gartner research is the fundamental building block for all Gartner products and services. We combine our proprietary research methodologies with extensive industry and academic relationships to create Gartner products and services that address each role across an enterprise.

Within the Research segment, Global Technology Sales (“GTS”) sells products and services to users and providers of technology, while Global Business Sales (“GBS”) sells products and services to all other functional leaders, such as supply chain, marketing, HR, finance, legal and sales.

Our research agenda is defined by clients’ needs, focusing on the critical issues, opportunities and the challenges they face every day. We are in steady contact with over 15,000 distinct client enterprises worldwide. We publish tens of thousands of pages of original research annually, and our research experts have more than 400,000 direct client interactions annually.

Our proprietary research content, presented in the form of reports, briefings, updates and related tools, is delivered directly to the client’s desktop through our website and/or product-specific portals. Clients normally sign subscription contracts that provide access to our research content and advisory services for individual users over a defined period. We typically have a minimum contract period of twelve months for our research and advisory subscription contracts and, on December 31, 2020, a significant portion of our contracts were multi-year. Gartner research is the fundamental building block for all Gartner services. We combine our proprietary research methodologies with extensive industry and academic relationships to create Gartner solutions.
Kirk Perry
President and CEO
BS, Business Administration, University of Cincinnati

IRI (INFORMATION RESOURCES, INC.)*

iriworldwide.com | Founded: 1979

2020 U.S Revenue: $1,000.0 million
Percent Change from 2019: 11.1%
2020 Non-U.S. Revenue: $400.0 million
Percent from Outside U.S.: 28.6%
2020 Worldwide Revenue: $1,400.0 million
Employees: 1,925

U.S. Headquarters: Chicago, IL
Other Offices: Multiple offices in the U.S. and Puerto Rico and in Australia, Canada, France, Germany, Greece, Hong Kong, Italy, Korea, Netherlands, New Zealand, South Africa, Spain, Sweden, United Kingdom

IRI is a fast-growing, leading provider of big data, predictive analytics and forward-looking insights that help CPG, OTC health care organizations, retailers, financial services and media companies grow their businesses. With the largest repository of purchase, media, social, causal and loyalty data, all integrated into an on-demand, cloud-based technology platform, IRI is empowering the personalization revolution, helping to guide its more than 5,000 clients around the world in their quests to remain relentlessly relevant, capture market share, connect with consumers, collaborate with key constituents and deliver market-leading growth.

IRI is a leading provider of big data, predictive analytics and forward-looking insights that help CPG, OTC health care organizations, retailers, financial services and media companies grow their businesses. A confluence of major external events — a change in consumer buying habits, big data coming into its own, advanced analytics and personalized consumer activation — is leading to a seismic shift in drivers of success in all industries.

* % Change calculation reflects adjustment of previously reported 2019 U.S. research revenue due to acquisition/divestiture activity or other business change during 2020.

Chris Caldwell
President and CEO
concentrix.com | Founded: 1983

2020 U.S Revenue: $678.2 million
Percent Change from 2019: -10.4%
2020 Non-U.S. Revenue: $2,468.2 million
Percent from Outside U.S.: 78.5%
2020 Worldwide Revenue: $3,146.4 million
U.S. Employees: 3,000

U.S. Headquarters: Fremont, CA
Other Offices: Multiple offices in the U.S. and about 40 other countries

Concentrix is a global provider of technology-infused Customer Experience (“CX”) solutions that help iconic and disruptive brands drive deep understanding, full lifecycle engagement, and differentiated experiences for their customers around the world. It provides end-to-end capabilities, including CX process optimization, technology innovation, front- and back-office automation, and analytics and business transformation services to clients in five primary industry verticals. The company’s differentiated portfolio of solutions support Fortune Global 500 as well as high-growth companies across the globe in their efforts to deliver an optimized, consistent brand experience across all channels of communication: voice, chat, email, social media, asynchronous messaging, and custom applications. We strive to deliver exceptional services supported by our deep industry knowledge, technology and security practices, talented people, and digital and analytics expertise.

Concentrix offers integrated solutions supporting the entirety of the customer lifecycle; CX and user experience (“UX”) strategy and design; analytics and actionable insights; and innovative new approaches to enhancing the customer experience through the latest technological advancements in our industry. Concentrix has shifted from traditional Customer Relationship Management (“CRM”), which is focused on a portion of the customer lifecycle, to CX, which supports the entirety of it. With its end-to-end capabilities,
Concentrix delivers better economic outcomes to our clients with solutions designed to meet their unique needs as they navigate a landscape characterized by discerning consumers and new market entrants.

The Concentrix Voice of the Customer (VOC) solution combines technology with experience management (XM) services provided by our in-house team of hundreds of CX professionals.

Powered by analytic tools and artificial intelligence (AI), our customer feedback platform ConcentrixCX helps companies listen, analyze and act on omnichannel customer feedback at any point in the customer journey, at scale. Features include data capture and integration, real-time reporting and analytics, and coaching and employee engagement tools.

Concentrix continues to invest in enhanced platform functionality – for example, multi-source data expansion of our proprietary text analytics engine, including structured and unstructured customer feedback sources such as surveys, social, messaging, complaints and email. New digital data collection capabilities include a conversational feedback bot and embedded micro-journey surveys.

Concentrix experience management services range from program management to strategic advisory services and are custom-tailored to free clients’ internal teams to focus on transformational impact. Our CX experts specialize in quantitative and qualitative techniques, delivering data-driven insights through solutions like survey design, relational loyalty research, CX journey analytics, digital channel optimization, customer segmentation, customer effort assessment and integrated CX analytics.

Until December 2020, Concentrix was a wholly owned subsidiary of SYNNEX Corporation (NYSE: SNX).

* % Change’ calculation reflects adjustment of previously reported 2019 U.S. research revenue due to acquisition/divestiture activity or other business change during 2020.

IPSOS*
INSIGHTS ASSOCIATION MEMBER

Nathalie Roos
CEO
NEOMA Business School

Pierre LeManh
CEO, North America
MBA, Ecole Superieure Sciences Economiques et Commerciales

ipsos.com | Founded: 1975

2020 U.S Revenue: $634.0 million
Percent Change from 2019: -7.0%
2020 Non-U.S. Revenue: $1,423.0 million
Percent from Outside U.S.: 69.2%
2020 Worldwide Revenue: $2,057.0 million
U.S. Employees: 1,860

U.S. Headquarters: New York, NY
Other Offices: Multiple offices in the U.S. and offices in 85 other countries

2020 was a year of resilience and agility for Ipsos. Our staff rose together to meet unprecedented challenges. We had to be innovative, rethink and adapt, awhile staying close to our clients, to each other and to our Ipsos values. We represented the voice of all people as citizens, customers, audiences, and patients in the rooms where decisions are made.

Ipsos is stronger today than yesterday. Overall, the Group’s 2020 profitability was up close to 40 basis points compared to 2019 – a remarkable turnaround from mid-year, when it was down 230 basis points. Our clients understood that data, analysis, interpretation and advisory services would allow them to measure and understand the context in which they operate and its overall impact. Perhaps, more than ever, our clients needed a total understanding of society, markets and people in the rapidly changing times. After the turmoil of Q2, they were able to invest in their growth, which led to our own.

In 2020, we launched exciting new services to meet our clients’ rapidly changing needs, many building on the Ipsos. Digital platform launched in 2019, including Brand Signals and Creative|Spark. Following the early-2020 acquisition of Maritz Mystery Shopping in the U.S., our teams quickly pivoted from traditional mystery shopping to a focus on on-site safety and compliance audits and launched services related to consumer health and safety. Our global syndicated Essentials tracker survey and its domestic, public companion provided a near real-time look at public opinion about social and consumer issues related to the ongoing pandemic. Corporate clients, governments and NGO organizations relied upon this data for critical decision-making for themselves and the public. Our public polling raised our corporate profile with partners like the World Economic Forum, ABC News, USA Today, Axios, NPR and others keeping a pulse on the 2020 presidential
election and related issues.

2021 shows an accelerating pace of financial improvement particularly in North America. As we grow our already strong client relationships as trusted advisors, our clients know that Ipsos is the research supplier that can keep their businesses agile and prepared for whatever 2021 brings.

* ‘% Change’ calculation reflects adjustment of previously reported 2019 U.S. research revenue due to acquisition/divestiture activity or other business change during 2020.

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WESTAT**

Scott Royal
President & CEO
PhD, Johns Hopkins University
westat.com | Founded: 1963

2020 U.S Revenue: $570 million
Percent Change from 2019: -3.4%
2020 Non-U.S. Revenue: $5.0 million
Percent from Outside U.S.: .9%
2020 Worldwide Revenue: $575.0 million
U.S. Employees: 1,800

U.S. Headquarters: Rockville, MD
Other Offices: Multiple offices in the U.S. and in Costa Rica, South Africa, Thailand

Westat began as a visionary start-up in 1963. Now, over 50 years later, we continue to pioneer new ways to support the changing needs of our clients. Our unique collaborative culture enables us to create dynamic multifaceted teams with broad experience across a wide range of topics. Westat is a 100 percent employee-owned research and professional services company. Westat provides extensive survey design and operations capabilities in support of modern data collection from households, institutions, businesses, and individuals. We apply multiple modes of data collection and survey management to achieve maximum response rates.

The company’s focus areas and capabilities include:

- Statistical analysis and methodological research in survey design, experiments and testing, data science and analytics, statistical disclosure control, and qualitative research
- Program, process, and outcome evaluation using diverse methodologies from design to implementation to guide each program to success
- Health research, including behavioral and mental health, clinical studies and clinical trials, public and international health, health care delivery, patient safety, and health communications campaigns
- Social policy research and technical assistance for implementing innovative evaluation, quality improvement, and service delivery systems
- Education programs for supporting teachers, conducting evaluations, and providing technical assistance
- Transportation studies of travel behaviors, safety, and human factors using advanced technologies such as instrumented vehicles and simulators, field observational studies, and online and mobile device based surveys

To support our research projects, Westat designs tailor-made approaches for clients as well as invests in many general and specialized IT technologies and products. Westat also provides licensing, training, and support for Blaise®, a major data collection software system produced by Statistics Netherlands and used internationally.

Westat will continue its commitment to quality work as we grow our capabilities in each of these areas to meet clients’ needs.

**Some or all figures are not made available by this company so instead are based on research and estimation by the Report author

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KANTAR*

INSIGHTS ASSOCIATION MEMBER

Ian Griffiths
Deputy CEO
kantar.com | Founded: 1993
2020 U.S Revenue: $557.4 million
Percent Change from 2019: 7.9%
2020 Non-U.S. Revenue: $2,229 million
Percent from Outside U.S.: 80%
2020 Worldwide Revenue: $2,837.7 million
U.S. Employees: 2,547

U.S. Headquarters: New York, NY
Other Offices: Multiple offices in the U.S. and offices in 100 countries

Kantar is one of the world’s largest data, insights and consulting companies, bringing together some of the world’s leading research. Our offer covers the breadth of techniques and technologies, from purchase and media data to predicting long term trends, neuroscience to exit polls, large scale quantitative studies to qualitative research, to incorporating ethnography and semiotics.

Kantar is a data and evidence-based agency providing insights and actionable recommendations to clients, worldwide. We have a complete, unique and rounded understanding of people around the world: how they think, feel and act, globally and locally in over 90 markets.

We collect our data digitally and share our insights in real time – at scale and at speed. We even have a self-service solution which returns the results on the same day. There are also deep diagnostic solutions that take a little longer to produce. With the use of AI and machine learning we have been able to offer new services, ones we couldn’t have dreamt of offering only a few years ago.

Our clients are wonderfully diverse. We inspire, inform and collaborate with them to create strategies improve brand awareness, attract more consumers, increase brand penetration and financial success and/or grow their confidence in public services.

In 2019, WPP completed the sale of 60% of Kantar to Bain Capital.

* '% Change' calculation reflects adjustment of previously reported 2019 U.S. research revenue due to acquisition/divestiture activity or other business change during 2020.

John Wasson
President & CEO
MS, Massachusetts Institute of Technology

ICF is a global consulting services provider with more than 7,000 professionals focused on making big things possible for our commercial and government clients in the United States, Europe and Asia. Employees are survey researchers, business analysts, policy specialists, technologists, digital strategists, social scientists and creatives. A significant percentage, who work in 65 countries globally, have earned advanced educational degrees, bringing deep specialization to client engagements.

Clients work with ICF on issues that matter profoundly to their success, whether it’s a product, program, social issue or policy that matters to the world. We offer comprehensive survey research services that empower clients to gain valuable and actionable insights on issues that matter.

For more than 40 years, we have demonstrated design, methodological, and statistical knowledge through the implementation of large and complex survey research projects. Our clients consist of United States federal, state, and local agencies, universities, nonprofits, and commercial organizations.

Our survey research services include:

- Analyzing, reporting, and presenting findings
- Conducting surveys through a variety of data collection methods
- Designing samples, data collection protocols, and instruments
- Protecting all processes and data through quality assurance and system security

The company recently celebrated 10 years of being publicly traded on NASDAQ, and launched a new brand, website and...
visual identity last year. In addition, the Survey Research Practice completed the certification process for ISO 20252, providing independent third-party validation that our quality processes and procedures are comprehensive, transparent, and documented.

Moving forward, we recently completed the installation of our state-of-art and fully integrated and security-enhanced data collection system, allowing ICF to securely and most efficiently collect survey research data across all modes. We continue to be dedicated to solving the world’s most complex challenges and tackle problems with ingenuity on issues that matter profoundly to our clients.

*’% Change’ calculation reflects adjustment of previously reported 2019 U.S. research revenue due to acquisition/divestiture activity or other business change during 2020.

THE NPD GROUP*

Tod Johnson
Executive Chairman
M.S.I.A., Carnegie Mellon University

Karyn Schoenbart
CEO
BA, University of Massachusetts

npd.com | Founded: 1966

2020 U.S Revenue: $344.3 million
Percent Change from 2019: 5.2%
2020 Non-U.S. Revenue: $89.5 million
Percent from Outside U.S.: 20.6%
2020 Worldwide Revenue: $433.8 million
U.S. Employees: 1,249

U.S. Headquarters: Port Washington, NY
Other Offices: Multiple offices in the U.S. and offices in 19 countries

NPD’s global information and advisory services help the world’s leading brands achieve datadriven growth. NPD combines data, industry expertise, and prescriptive analytics across more than 20 industries to help our clients measure markets, predict trends, and improve performance. Syndicated services include consumer tracking, retail tracking, and distributor tracking.

NPD measures consumer purchasing across all buying channels and provides point-of-sale data and account level information for participating retailers. NPD’s Checkout panel uses receipt harvesting to track and analyze omnichannel behavior. Point-of-sale data is collected from over 600,000 doors worldwide plus e-commerce and mobile platforms. Prescriptive analytics include market forecasting, pricing and promotion evaluation, and segmentation. With deep expertise in more than 20 industries, NPD also delivers thought leadership to the C suites of many of the world’s leading brands. Senior industry advisors are available for strategy sessions to guide long range planning or address specific needs, such as preparing for earnings calls.

In 2020, NPD increased executive advisory engagements, assisting clients in navigating COVID and its impact on their industries. NPD also launched faster data reporting and leveraged its Checkout panel to track consumer behavior as the movement on online shopping accelerated. The firm launched beauty and luxury tracking in China and acquired retail analytics innovator Pricing Excellence, which currently focuses on home improvement.

Looking ahead, NPD will continue to emphasize thought leadership with a strong focus on the future to understand and anticipate changes in consumer behavior and guide retail repositioning in a new normal. NPD is also leveraging new data collection technologies to enhance its coverage of the marketplace and is investing in its next generation platform for a more seamless delivery of increasingly robust data. NPD Practice Areas cover apparel, automotive aftermarket, appliances, beauty, books, consumer electronics, e-commerce, entertainment, fashion accessories, food, foodservice, footwear, home, home improvement, juvenile products, mobile, office supplies, retail, sports, technology, toys, and video games. NPD operates in 19 countries in the Americas, Europe, and Asia-Pacific, with offices in 27 cities.

*’% Change’ calculation reflects adjustment of previously reported 2019 U.S. research revenue due to acquisition/divestiture activity or other business change during 2020.

COMSCORE*

Bill Livek
CEO & Executive Vice Chairman
B.S. Southern Illinois University
comScore is a global information and analytics company that measures advertising, content, and the consumer audiences across each media platform. comScore creates its products using a global data platform that combines information from smartphones, tablets, computers, television (“TV”) and movie screens with demographics and other descriptive information.

comScore has developed proprietary data science that enables measurement of person-level and household-level audiences, removing duplicated viewing across devices over time. This combination of data and methods enable a common standard for buyers and sellers to transact on advertising. This helps companies across the media ecosystem better understand and monetize their audiences and develop marketing plans and products to more efficiently and effectively reach those audiences. Our ability to unify behavioral and other descriptive data enables us to provide audience ratings, advertising verification, and granular consumer segments that describe hundreds of millions of consumers.

comScore offers several solutions to help advertisers maximize cross-platform marketing effectiveness – be it measuring brand impact, viewability, or ad and audience delivery validation – as well as power cross-platform advertising for better targeting and stronger advertising ROI. comScore Advanced Audience segments go beyond age and gender to help advertisers better target consumers based on lifestyles, behaviors, demographics and interests. comScore pioneered this concept in digital, local and national TV.

comScore’s customers include digital publishers, television networks, movie studios, content owners, advertisers, agencies and technology providers. The platforms we measure include televisions, smartphones, computers, tablets, over-the-top (“OTT”) devices and movie theaters. The information we analyze crosses geographies, types of content and activities, including websites, mobile applications (“apps”), video games, television and movie programming, electronic commerce (“e-commerce”) and advertising.

*‘% Change’ calculation reflects adjustment of previously reported 2019 U.S. research revenue due to acquisition/divestiture activity or other business change during 2020.*

Peter Feld
CEO
MSc, RWTH Aachen University

gfk.com | Founded: 1934

2020 U.S Revenue: $310.0 million
Percent Change from 2019: -3.1%
2020 Non-U.S. Revenue: $1,115.0 million
Percent from Outside U.S.: 78.2%
2020 Worldwide Revenue: $1,425.0 million
U.S. Employees: 840

U.S. Headquarters: New York, NY
Other Offices: Multiple offices in the U.S. and offices in 100 countries

GfK connects data and science. Innovative research solutions provide answers for key business questions around consumers, markets, brands and media – now and in the future. As a research and analytics partner, GfK promises its clients all over the world “Growth from Knowledge.”

The increasing speed of product innovation, the rise of new channels, and emerging customer needs are all part of business today. Our clients are businesses around the globe. To make the best possible business decisions every day, they need more than purely descriptive data; they require actionable recommendations based on advanced analytics and powered by leading-edge technology. We are in the unique position to leverage proprietary and third-party data to create indispensable predictive market and consumer insights and recommendations.

Our industry focus provides GfK market researchers with a thorough understanding of business issues and questions specific to their concerns. Industries we cover include Automotive, Consumer Goods, Fashion & Lifestyle, Media & Entertainment, Retail, Technology, and Travel and Hospitality.
An important event for GfK in North America has been the joint venture between MRI and Simmons Research. MRI-Simmons is the leading provider of insights on the American consumer. With thousands of attitudinal and behavioral data points, gathered through ongoing surveys and passive measurement, MRI-Simmons empowers advertisers, agencies and media companies with deeper insights into the “why” behind consumer behavior.

**Some or all figures are not made available by this company so instead are based on research and estimation by the Report author**

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**FORRESTER RESEARCH SERVICES**

George F. Colony  
Chairman and CEO  
A.B., Harvard University

forrester.com | Founded: 1983

- 2020 U.S Revenue: $230.0 million  
- Percent Change from 2019: -1.6%  
- 2020 Non-U.S. Revenue: $64.5 million  
- Percent from Outside U.S.: 21.9%  
- 2020 Worldwide Revenue: $294.5 million  
- U.S. Employees: 520

U.S. Headquarters: Cambridge, MA  
Other Offices: Multiple offices in the U.S. and in France, Germany, India, The Netherlands, Singapore, and the United Kingdom

Forrester Research Services is the research component of Forrester, one of the most influential research and advisory firms in the world. We work with business and technology leaders to develop customer-obsessed strategies that drive growth. Forrester’s unique insights are grounded in annual surveys of more than 675,000 consumers and business leaders worldwide, rigorous and objective methodologies, and the shared wisdom of our most innovative clients.

Our Research offerings consist of a library of cross-linked documents that interconnect our playbooks, reports, data, product rankings, best practices, evaluation tools, and research archives. Research access is provided through role-based websites that facilitate client access to research and tools that are most relevant to their professional roles, including community tools that allow interaction between and among clients and our analysts.

Our Age of the Customer Research offering, which combines our Business Technology (BT) and Marketing and Strategy (M&S) Research offerings, is closely aligned with our strategy of addressing our clients’ and prospects’ opportunities and challenges in the Age of the Customer.

Forrester Research’s research and decision tools enable clients to better anticipate and capitalize on the disruptive forces affecting their businesses and organizations, providing insights and frameworks to drive growth in a complex and dynamic market.

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**J.D. POWER**

Dave Habiger  
President and CEO  
MBA, University of Chicago

jdpower.com | Founded: 1968

- 2020 U.S Revenue: $220.0 million  
- Percent Change from 2019: 1.4%  
- 2020 Non-U.S. Revenue: $115.0 million  
- Percent from Outside U.S.: 34.3%  
- 2020 Worldwide Revenue: $335.0 million  
- U.S. Employees: 775

U.S. Headquarters: Costa Mesa, CA  
Other Offices: Multiple offices in the U.S. and offices in North/South America, Asia Pacific, and Europe

J.D. Power is a global leader in consumer insights, advisory services and data & analytics. Those capabilities enable J.D. Power to help its clients drive customer satisfaction, growth and profitability. Established in 1968, J.D. Power is headquartered in Costa Mesa, Calif., and has offices serving North/South America, Asia Pacific and Europe. J.D. Power is a portfolio company of XIO Group.

J.D. Power offers market research, forecasting, consulting, training, and consumer surveys of product and service quality, customer satisfaction, and buyer behavior. The company’s independent industry benchmark studies, innovative data & analytics products, and customized advisory services provide insights and help
companies improve quality, engagement, and business performance. Annual syndicated studies are based on survey responses from millions of consumers and business customers worldwide. The firm does not review, judge or test products and services for its syndicated studies. It relies on the opinions and perspectives of consumers who have actually used the products and services being rated.

J.D. Power is most often recognized for its work in the automotive industry, where its metrics have become the industry standard for measuring product quality and customer satisfaction. A team of associates worldwide conducts quality and customer satisfaction research across industries including automotive, financial services, insurance, telecommunications, travel, healthcare, utilities and consumer electronics.

Gallup operates 30 regional City Centers and collects data in over 160 countries.

**Some or all figures are not made available by this company so instead are based on research and estimation by the Report authors**

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**GALLUP**

Jim Clifton
Chairman and CEO
gallup.com | Founded: 1935

2020 U.S Revenue: $200.0 million
Percent Change from 2019: 0.0%
2020 Non-U.S. Revenue: $225.0 million
Percent from Outside U.S.: 52.9%
2020 Worldwide Revenue: $425.0 million
U.S. Employees: 1,875

U.S. Headquarters: Washington, D.C.
Other Offices: Multiple offices in the U.S. and around the world

Gallup is an analytics and advisory company helping leaders and organizations solve their most pressing problems. Founded by George Gallup in 1935 to conduct public opinion polling worldwide, Gallup expanded its business focus to include analytics, management consulting, educational consulting, and the Clifton Strengths assessment, among other products and services.

Combining more than 80 years of experience with its global reach, Gallup’s polls, data collection, analytics, and consulting have established knowledge about the attitudes and behaviors of employees, customers, students, and citizens around the world. At present, 99% of the world’s population is represented by Gallup’s World Poll; 35 million respondents are in Gallup’s employee engagement database; 160 countries are included in the Gallup Analytics database; and over 20 million people have taken the CliftonStrengths assessment, with 90% of Fortune 500 companies using the CliftonStrengths assessment.

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**WOOD MACKENZIE**

Neal Anderson
President & CEO
MSc, Imperial College of London
woodmac.com | Founded: 1973

2020 U.S. Revenue: $165.0 million
Percent Change from 2019: 10.0%
2020 Non-U.S. Revenue: $380.0 million
Percent from Outside U.S.: 69.7%
2020 Worldwide Revenue: $545.0 million
U.S. Employees: 345

U.S. Headquarters: New York, NY
Other Offices: Multiple offices in the U.S. and in nineteen other countries

Wood Mackenzie, a Verisk business, is a leading research and consultancy business for the global energy, chemicals, metals and mining industries. Wood Mackenzie launched in 1923 as a small, relatively unknown, Edinburgh-based stockbroker. By the 1970s, we had become one of the top three stockbrokers in the UK, renowned for the quality of its equity research.

Our success has always been underpinned by the clear and simple principle of providing trusted research and advice that would make a difference to clients. This was true when the first oil report was published by our equity analysts in 1973, and remains just as
relevant to us today. So much so that, over the past four decades, we have drawn upon our heritage to create a global research and consultancy business that has grown alongside the needs of its clients.

Having cultivated deep expertise in upstream oil and gas, we carefully broadened our focus to deliver the same level of detailed insight for every interconnected sector of the energy, chemicals, metals and mining industries we now serve around the world. But, heritage is more than just history, our expert analysts and consultants have connected us to some of the most significant events of our time – creating insight for governments, boards and CEOs who have helped shape the future direction of the world’s natural resources industries and their impact on society.

Today we are part of the Verisk family which has broadened our data and analytics platform and strengthened our ability to provide intelligence that helps drive growth and serve thousands of industry market leaders. What endures is our focus on delivering excellent, forward-looking research, which underpins the analysis and advice we offer, and the knowledge that our success is intrinsically linked to the needs of our clients’.

**Some or all figures are not made available by this company so instead are based on research and estimation by the Report author**

Material is a leading integrated marketing services company that leverages deep human understanding to help brands deliver material outcomes and experiences for their customers and the communities they serve.

Originally born from insights in 1973 as Lieberman Research West, the company has since evolved to become Lieberman Research Worldwide and LRW, before taking on the Material name in July 2020.

Even as Material’s offerings have expanded to include a range of marketing services from brand strategy, to brand marketing, to product design, to loyalty & CRM, the company remains true to its insights and analytics DNA. Material’s innovative behavioral science practices help B2C and B2B businesses understand the effects of psychological, emotional, cultural, and social factors on consumer decision making. And by applying state-of-the-art modeling and analytic techniques, its data science team uncovers new insights that help brands solve problems that they never knew existed.

Material’s emphasis on deep human understanding proved especially valuable in 2020 as brands sought to keep up with dramatic changes in consumer behavior caused by COVID-19. By examining the shifts in consumer habits, motivations, and identities, Material helped some of the world’s leading brands discover new and powerful ways to connect and reestablish with their customers.

Within the last year, Material has built a unique structure that takes clients on a seamless journey across data and analytics, insights-led consulting, and experience activation, all guided by one Material leader at every point along the way.

In 2021, Material’s team of strategists, creators, technologists, designers, researchers, and storytellers continues to expand this Connections approach to produce better outcomes for brands and their customers.

While Material maintains a physical presence in 11 cities across the U.S., U.K., and the Netherlands, it continues to collect and deliver insights in markets across the globe.

* % Change* calculation reflects adjustment of previously reported 2019 U.S. research revenue due to acquisition/divestiture activity or other business change during 2020.
DRG (DECISION RESOURCES GROUP)* **

Thomas Halliday
Global Head
Business Administration, UWE Bristol
decisionresourcesgroup.com | Founded: 1990

2020 U.S Revenue: $160.0 million
Percent Change from 2019: 3.2%
2020 Non-U.S. Revenue: $50.0 million
Percent from Outside U.S.: 23.8%
2020 Worldwide Revenue: $210.0 million
U.S. Employees: 400

U.S. Headquarters: Burlington, MA
Other Offices: Multiple offices in the U.S. and in Canada, India, Japan, Singapore, and the United Kingdom

DRG provides data, analytics, and insights to pharma, biotech, and medical technology companies. DRG reframes these challenges, enabling our customers to see the opportunities. Pharmaceutical, biotechnology, medical technology and managed care companies rely on this analysis and data to make informed decisions critical to their success.

Framing the current status and future trends in target healthcare markets using data, primary research and secondary research is a core competency of DRG. Product offerings include: high-value analytics, syndicated research, proprietary databases, decision support tools, and advisory services.

DRG has a number of key specialties including: syndicated research focused on new therapeutic opportunities, portfolio planning, changing industry dynamics and global treatment patterns, insights and data on physician and consumer healthcare e-marketing, and proprietary databases and analytics. DRG covers more than 90% of the U.S. managed care markets.

Also included are longitudinal data and analytics on marketed drug reimbursement profiles; qualitative insights on drug-specific reimbursement drivers for existing and emerging therapies; managed markets training; and evidence-based market access solutions.

In March 2020, Clarivate Analytics completed the acquisition of DRG from Piramal Enterprises.

* % Change* calculation reflects adjustment of previously reported 2019 U.S. research revenue due to acquisition/divestiture activity or other business change during 2020.

**Some or all figures are not made available by this company so instead are based on research and estimation by the Report author

INMOMENT (MARITZCX)*

Andrew Joiner
CEO
GMP, Harvard University
inmoment.com | Founded: 2002

2020 U.S Revenue: $124.0 million
Percent Change from 2019: 5.1%
2020 Non-U.S. Revenue: $44.0 million
Percent from Outside U.S.: 26.2%
2020 Worldwide Revenue: $168.0 million
U.S. Employees: 600

U.S. Headquarters: South Jordan, UT
Other Offices: Multiple offices in the U.S. and in Australia, China, France, Germany, Singapore, New Zealand, and the United Kingdom

InMoment is a software and research company that focuses on customer and employee experiences. We offer a unique combination of award-winning software, industry leading data and research science, deep vertical market expertise, and managed program services. We provide a full-service professional CX approach designed to continuously improve the customer experience and deliver business outcomes to an impressive list of clients that includes 90 percent of the world’s automotive companies: 8 out of 10 of the top banks, nearly 20 percent of the top 50 retailers, 40 percent of the top hospitality companies, and 4 out of 5 of the top insurers.

With the acquisition of MaritzCX in 2020, our research insights include our leading CXStandards competitive benchmarking research that delivers quarterly benchmarks for 55 CX categories across 16 industries. The New Vehicle Customers Study (NVCS) is the world’s longest running benchmark of vehicle satisfaction with
over 50 years of data, and provides consumer feedback about vehicle experiences, shopping and buying patterns, and feature preferences to automotive manufacturers and OEMs. Our CXEvolution study of over 10,000 practitioners provides feedback that informs brands of their CX gaps.

Along with custom studies, we specialize in solutions for key industries, including automotive, financial services, hospitality, retail, technology, B2B, the world’s leading brands and 1.9 million active users who speak 72 languages in 100 countries.

Our focus is to leverage the InMoment platform, our industry-leading studies and research services to build deeper relationships and drive more meaningful experiences between our clients and their customers by adding product and research services and continued thought leadership in the Customer Feedback Management market.

* % Change' calculation reflects adjustment of previously reported 2019 U.S. research revenue due to acquisition/divestiture activity or other business change during 2020.

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ESCALENT
INSIGHTS ASSOCIATION MEMBER

Melissa Sauter
CEO
MA, University of Michigan
escalent.co |
Founded: 1975

2020 U.S Revenue: $103.4 million
Percent Change from 2019: 6.5%
2020 Non-U.S. Revenue: $8.3 million
Percent from Outside U.S.: 7.4%
2020 Worldwide Revenue: $111.7 million
U.S. Employees: 358

U.S. Headquarters: Livonia, MI
Other Offices: Multiple offices in the U.S., Canada, China, India, Ireland, Italy, the Philippines, Singapore, South Africa, UAE, and the UK

Escalent is a human behavior and analytics advisory firm specializing in industries facing disruption. We transform data and insights into an understanding of what drives human behavior, and we help businesses turn those drivers into actions that not only build brands, but enhance customer experiences, inspire product innovation and transform business.

Escalent specializes in Automotive & Mobility, Consumer & Retail, Energy, Financial Services, Health, Technology and Telecommunications. Focusing on select industries allows us to function as a trusted business partner who knows the challenges our clients face and understands how to engage their most valuable audiences.

In May 2021, Escalent acquired Grail Insights, a strategic insights company. The acquisition creates a seamless flow between primary, secondary, syndicated, and internal business data streams, providing consulting and advisory services from insights through implementation. Working side-by-side with clients as an extension of their team, we advance insights along the entire business continuum to streamline processes and accelerate productivity.

We have three centers of excellence: Qualitative Research combines emerging technologies, anthropology, and ethnography to tap into human insights that reveal real needs and potential; Marketing & Data Sciences combine survey, behavioral, transactional, and third-party data to solve tough research challenges; and Insight Communities provide private, online platforms for brands to engage with groups of stakeholders to quickly and easily draw insight. Escalent’s syndicated research includes a portfolio of wealth management and energy products as well as portal-based solutions that provide continuous data collection and online reporting.

Escalent established a team of Ph.D. behavioral scientists to understand drivers of non-conscious decision-making and how to harness their impact on behavior. We integrate behavioral science into the project design, analysis and deliverable as a core approach instead of layering it in afterwards. The insights reveal the structured “whys” which become the foundation for creating the “how to influence” across marketing touchpoints.

Each year, Escalent conducts international tracking programs and custom research for its clients across six continents.
“In a world of data proliferation, we are data-rich but insight-poor. One of the reasons is that the journey of translating data to information to insights is fraught with quality and misinterpretation risks. I value Insights Professional Certification (IPC) Master as it provides an objective measure of proficiency and commitment to the evolving research landscape while adhering to high ethical standards.”

— Rahul Choudaha, PhD, IPC, Director of Industry Insights and Research Communications, Graduate Management Admission Council

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Informa Financial Intelligence is a leading provider of business intelligence, market research, and expert analysis to the financial industry. The world’s top global financial institutions and banks look to Informa Financial Intelligence for our authority, precision, and forward-focused analysis.

Informa Financial Intelligence consists of key research, analysis, and industry experts, such as Informa Research Services, EPFR Global, Informa Global Markets, iMoneyNet, Informa Investment Solutions, eBenchmarkers, and Mapa Research.

Informa Financial Intelligence provides fund and wealth managers, traders, insurers, analysts, and investment and retail bankers with the intelligent advantage to make informed decisions, understand past trends, forecast future performance, drive profitability, and increase returns.

Because of their strong background in the financial industry, the research teams of Informa Financial Intelligence are highly qualified to help financial institutions with their market research needs. Informa’s researchers are experts in benchmarking studies, competitive intelligence, new product development and usability testing, customer/member satisfaction and loyalty research, brand/advertising awareness research, and mystery shopping services for sales and service quality evaluation, legal and match pair testing, compliance, discrimination, and misleading sales practices testing.

Informa is considered a leader in the use of market research to limit the risk associated with allegations of discrimination, UDAAP (unfair, deceptive, or abusive acts or practices), predatory lending, and misleading sales practices.

Informa Financial Intelligence serves more than 1,700 client firms, in 63 countries, with more than 40,000 users.

**Some or all figures are not made available by this company so instead are based on research and estimation by the Report author**

Dunnhumby is a customer science company that analyzes data and applies insights for nearly one billion shoppers across the globe to create personalized customer experiences in digital, mobile, and retail environments. Our strategic process, proprietary insights, and multichannel media capabilities build loyalty with customers to drive competitive advantage and sustained growth for clients.

Dunnhumby uses data and science to understand customers, then applies that insight to create personalized experiences that build lasting emotional connections with retailers and brands. It’s a strategy that demonstrates when companies know and treat their customers better than the competition, they not only earn their loyalty but a competitive advantage.
dunnhumby was established in the U.S. to help retailers and manufacturers put the customer at the heart of their business decisions. Analyzing data from millions of customers across the country, we enable clients to use this insight to deliver better shopping experiences and a more relevant marketing strategy to their customers.

By putting best customers at the center of every decision, dunnhumby’s approach delivers measurable value, competitive edge and even more customer data to fuel ongoing optimization, setting clients up for long-term success.

dunnhumby serves a prestigious list of retailers and manufacturers in grocery, consumer goods, health, beauty, personal care, food service, apparel, and advertising, among others. Clients include: Tesco, Procter & Gamble, Coca-Cola, Macy’s and PepsiCo.

dunnhumby Ltd., is a privately held and wholly owned subsidiary of Tesco PLC employs over 2,000 experts in offices throughout Europe, Asia, Africa and the Americas and includes social marketing experts BzzAgent and programmatic advertising company Sociomantic.

YouGov is a global research data and analytics provider with operations in the UK, North America, Europe, Nordics, Middle East and Asia Pacific. Our core offering of opinion data is derived from our proprietary Global Panel of over 15 million people across 59 markets. The YouGov Global Panel provides us with thousands of data points on consumer attitudes, opinions and behavior. We capture these streams of data in the YouGov Cube, our unique connected data library that holds over 10 years of historic single-source data. In 2020, YouGov panelists completed over 53 million surveys.

Our syndicated data products include the daily brand perception tracker, YouGov BrandIndex, and the media planning and segmentation tool, YouGov Profiles, which holds over 250,000 data variables about YouGov panelists. Our market-leading YouGov RealTime service provides a fast and cost-effective survey solution for reaching nationally representative and specialist samples.

YouGov’s Custom Research division offers a wide range of quantitative and qualitative research, tailored by sector specialist teams to meet our client’s specific research requirements. YouGov data is delivered through Crunch, the most advanced analytics tool for research data, combining super-fast processing with drag-and-drop simplicity. We have a strong record for data accuracy and innovation. A study by the Pew Research Center concluded YouGov “consistently outperforms competitors on accuracy” as a vendor of choice. We are the market research pioneer of Multilevel Regression with Post-stratification (MRP) for accurate predictions at a granular level.

In 2020, we launched YouGov Direct, a blockchain-based innovative digital advertising and consumer data platform, in the US that gives consumers control of their data by allowing them to extract fair value for its use and give marketers and advertisers lightning-fast results for their market research questions. In addition, we developed YouGov Safe, a fully opt-in, GDPR & CCPA compliant, ethical cross-device tracker and data marketplace that provides clients with a transparent view of consumers’ verified online behaviors and transactions while rewarding consumers for choosing to share their data. 2 YouGov’s data-led offering supports and improves a wide spectrum of marketing activities of a customer-base including media owners, media agencies and some of the world’s most recognized brands.

**Some or all figures are not made available by this company so instead are based on research and estimation by the Report author**
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**PSB INSIGHTS**

Peter Horst  
CEO  
MBA, Tuck School of Business, Dartmouth

psbinsights.com | Founded: 1977

2020 U.S Revenue: $80.0 million  
Percent Change from 2019: 6.7%  
2020 Non-U.S. Revenue: $15.0 million  
Percent from Outside U.S.: 15.8%  
2020 Worldwide Revenue: $95.0 million  
U.S. Employees: 325

U.S. Headquarters: Washington, D.C.  
Other Offices: Multiple offices in the U.S. and international offices in London and Dubai.

PSB Insights (formerly Penn Schoen Berland) is a full-service strategic consultancy, offering custom research and analytics-based solutions including, fast-turn, quantitative and qualitative services that are underpinned by innovation and our strong legacy of custom design and hard to reach audiences. We create insights that give global brands, local businesses, and world leaders the confidence to make informed decisions. Our areas of expertise include communications strategy, brand strategy and tracking, crisis management, and thought leadership.

We are collaborative and act as strategic partners to help clients tackle the most difficult brand, business, and communications issues. Together, we help shape the right questions that most effectively address our clients’ business concerns. Using a multi-modal approach to unearthing insights, we collect all the useful nuggets from various sources to go deeper and address the most difficult challenges and find the WHY behind the data. We help keep data and insights at the heart of every decision.

PSB Insights is a member of the BCW Group of companies, which is part of WPP, a creative transformation company.

**Some or all figures are not made available by this company so instead are based on research and estimation by the Report author**

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**CELSO HEALTH PLC**

Julia Ralston  
CEO, Cello Health US

cellohealthplc.com | Founded: 2004

2020 U.S. Revenues: $70.0 million  
Percent Change from 2019: 0.0%  
2020 Non-U.S. Revenue: $130.0 million  
Percent from Outside U.S.: 65.0%  
2020 Worldwide Revenue: $200.0 million  
U.S. Employees: 250

U.S. Headquarters: New York, NY

Cello Health plc consists of four global capabilities that enable us to offer best-in-class services and an integrated partnership approach to our clients. This unique mix of capabilities, combined with our collaborative approach, results in a unique ‘fusion’ of expertise, providing powerful advisory and implementation solutions.

Cello Health Insight is a global marketing research company, providing business intelligence to the healthcare and pharmaceutical sectors. Cello Health Insight specializes in getting to the heart of our clients’ questions, using a large pool of creative and academic resources and providing design of materials and deliverables through a hand-picked project team – selected to best meet the needs of each individual project.

Cello Health Consulting is the strategic consulting arm of Cello Health, focused on delivering business results by unlocking the potential within organizations, people, assets and brands. Cello Health Consulting works alongside clients to create practical solutions which ensures buy-in and builds relationships.

Cello Health Consulting focuses on four key practices: Brand and Portfolio Strategy, Business Sciences, Early Product Commercialization, and Organizational Excellence.

Cello Health Communications combines science, strategy and creativity to unlock the potential of brands and assets. It focuses on Evidence2Engagement, building a foundational evidence base and translating that into outcome-focused behavior change; it focuses on how data and other insights are applied in a strategic framework to support clinical and commercial success. Cello Health Communications services underpin differentiated positioning.
and deliver brand optimization, focusing on multiple areas of development and launch through to commercial maturity.

* % Change calculation reflects adjustment of previously reported 2019 U.S. research revenue due to acquisition/divestiture activity or other business change during 2020.

**Some or all figures are not made available by this company so instead are based on research and estimation by the Report author

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**ENGINE INSIGHTS**

**INSIGHTS ASSOCIATION MEMBER**

Don Simons  
CEO, Insights North America at Engine  
MBA, International/Global Studies, Hofstra University


| 2020 U.S Revenue: $68.0 million |
| 2020 Non-U.S. Revenue: $40.0 million |
| 2020 Worldwide Revenue: $108.0 million |
| U.S. Employees: 230 |

U.S. Headquarters: New York, NY
Other Offices: Multiple offices in U.S. and in the United Kingdom, Europe, and Asia-Pacific

Engine is a new kind of data-driven marketing solutions company. Powered by data, driven by results and guided by people, we help our clients make connections that count—leading to bottom line growth, an inspired workplace and business transformation.

Engine has four major marketing solutions divisions. Engine Content, pairs an award-winning creative talent team with a highly strategic media planning and buying team in order to design brand experiences with a deep understanding of modern media and platforms. Engine Distribution brings together the best minds in media, data, analytics and technology to build custom media strategies, plans and solutions that drive business and organizational growth. Engine Technology is composed of 4 MarTech products that can be used together or separately—EMX, Local Marketing Cloud, Balihoo Co-op Center and Engine Connect, a data platform that aggregates and operationalizes client data, proprietary data, and third-party partners’ data. These products combine data and marketing technology to ensure programmatic success, and that your ads reach niche audiences, with personalized messaging that drives traffic and boosts revenue.

Engine Insights (formerly ORC International) connects traditional market research with cutting-edge products to deliver you a 360-degree view of your customers, employees and markets. Our extended suite of solutions and products are designed to support your business growth: from helping you understand and outperform the competition to operationalizing both survey and behavioral data to identify, attract, engage and retain your audiences.

Engine Insights’ client services and products include custom research and omnibus surveys; customer experience, customer retention, and brand engagement studies; and data management and data analytics. These services help clients to:

- Think beyond products and services to drive business revenue
- Use insights to inform more relevant messaging and creative
- Get a complete 360-degree view of your customers
- Segment audiences for better targeting
- Develop the perfect product and take it to market
- Create unique experiences that engage your customers and keep them loyal for a lifetime
- Build an internal culture that attracts, retains and engages the best talent

**Some or all figures are not made available by this company so instead are based on research and estimation by the Report author**

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Diane Surette
President & CEO
BS, Accounting, Bentley University
burke.com | Founded: 1931
2020 U.S Revenue: $67.6 million
Percent Change from 2019: -4.9%
2020 Non-U.S. Revenue: $7.4 million
Percent from Outside U.S.: 9.9%
2020 Worldwide Revenue: $75.0 million
U.S. Employees: 265

U.S. Headquarters: Cincinnati, OH
Other Offices: Multiple offices in the U.S.

Since 1931, Burke Inc. has consistently redefined expectations in the marketing research industry. We pride ourselves on helping our clients gain actionable perspective on their most critical business challenges. From segmentation, to customer engagement programs, to product innovation, to brand tracking, we design—and execute—objectives-driven quantitative and qualitative research, providing a range of solutions from agile to integrated strategic decision support across a variety of industries.

Today, Burke continues to push the boundaries of what marketing research can be, seamlessly uniting research, strategy, and education. Backed by Seed Strategy—our strategic consulting subsidiary—we have the capabilities to support our clients throughout every phase of the product/service life cycle, with expertise in strategy, innovation, branding, and marketing. In addition, we provide comprehensive training on research fundamentals and best practices through the Burke Institute—our dedicated education division and the industry’s leader in research and insights training. Wherever our clients find themselves on the path to success, we’re uniquely equipped to help them move forward with clarity, confidence, and purpose.

Continuing our long tradition of research innovation, Burke has unveiled two new offerings: Geode|AITM—an integrated insights system that analyzes multiple data sources to uncover patterns, relationships, and critical insights that are often hidden; and Burke Agile Insights—a suite of research services that provides effective, actionable results in any situation where reliable insights are crucial and time is of the essence.

Toro Sasaki
Representative Executive Officer,
Global CEO
Faculty of Commerce, Chuo University
macromill.com | Founded: 2000
2020 U.S Revenue: $67.0 million
Percent Change from 2019: -2.2%
2020 Non-U.S. Revenue: $303.3 million
Percent from Outside U.S.: 81.9%
2020 Worldwide Revenue: $370.3 million
U.S. Employees: 275

U.S. Headquarters: Cincinnati, OH
Other Offices: Multiple offices in the U.S. and the United Kingdom, The Netherlands, and Tokyo, Japan

Macromill Group is a rapidly-growing global market research and digital marketing solutions provider. We bring the collective power of our specialist companies to provide innovative data and insights that drive clients’ smarter decisions. Our industry-leading digital research solutions deliver rapid and cost-effective solutions to the challenges businesses face today. We are headquartered in Tokyo and Rotterdam with over 30 offices across the Americas, Europe and Asia. Macromill serves more than 3800 brands and agencies in more than 90 countries with over 1700 experts worldwide.

The group’s leading business units are Macromill and MetrixLab.

Macromill stands in the forefront of innovation, delivering unique marketing solutions. We offer exclusive access to the highest-quality online panel with over 2 million members including 1 million Yahoo! Research Monitor members. Using our self-developed platform “AIRs,” we provide full-service online research including automated survey creation and completion, data tabulation, and analysis. Our business portfolio has rapidly grown and is constantly evolving. Today, it includes services such as offline quantitative research, mobile research, POS database research (QPR), digital...
marketing (Accessmill), a DIY survey platform (Questant) and more. Headquartered in Tokyo, our global network can reach 87 countries across the world.

Metrixlab turns data from online surveys, social media, mobile devices and enterprise systems into valuable business information and actionable consumer insights. This helps leading companies drive product innovation, brand engagement and customer value. Owned and group panels provide expansive access to global respondents in mature and emerging markets. Our teams deliver strategic and tactical decision support by pushing the boundaries of data analysis innovation, combining cutting-edge technology with data science and proven marketing research methodologies. Clients across the globe rely on our hyper efficient data and insights ecosystem to deliver fast and affordable results.

* % Change’ calculation reflects adjustment of previously reported 2019 U.S. research revenue due to acquisition/divestiture activity or other business change during 2020.

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PHOENIX MARKETING
INTERNATIONAL

INSIGHTS ASSOCIATION MEMBER

Allen R. DeCotiis
Chairman and CEO
PhD, Emory University

Martha Rea
President and CRO
BS, University of South Florida

phoenixmi.com | Founded: 1999

2020 U.S. Revenues: $66.9 million
Percent Change from 2019: -13.1%
2020 Non-U.S. Revenue: $4.8 million
Percent from Outside U.S.: 6.7%
2020 Worldwide Revenue: $71.7 million
U.S. Employees: 329

U.S. Headquarters: Rhinebeck, NY
Other Offices: Multiple offices in the U.S. and in London,

Hamburg, and Shanghai.

Global Advertising and Brand Specialist Phoenix Marketing International (Phoenix MI) is one of the Top Research Firms in the U.S. and is one of the fastest-growing Market Research firms in the world. Operating in all major industries, Phoenix utilizes modern technology, innovative research techniques, and customized approaches to help our clients elevate their brand, refine their communications, and optimize their customer experience, applying precision and connectivity throughout our solutions.

Phoenix has recently enhanced its System1 testing framework, Dimensions, enabling clients to better understand consumers’ cognitive thinking and emotional subconscious attitudes & beliefs. These tools can be easily activated within our AdPi copy testing solution and in conjunction with our BE platform, which includes thousands of respondents with known ad exposure. Additionally, this approach ties directly into Phoenix’s proprietary method, Emotivation®, to uncover the emotional drivers behind consumer behavior and brand performance.

Phoenix has re-launched Ad Snapshots, an easy-to-use cloud-based platform that leverages proprietary, next-generation ACR technology to catalog National TV advertising in near real-time, providing an extensive source of TV advertising intelligence. In addition to identifying ads airing in real-time and new ads breaking, clients can gain insight on competitors’ media placement strategy, and access the most robust set of creative codes in the industry.

Earlier this year, Phoenix partnered with LiveRamp to launch Data Propulsion, offering audience activation segments to not only deliver who is viewing your ads but their response towards your brand and messaging. Phoenix’s Data Propulsion is the first and only solution to enable precision targeting throughout the purchase funnel based on in-market ad performance, including the ability to break through, create awareness, persuade, engage, and drive purchase action.

Late last year, Phoenix teamed up with ValueLabs to win The AIconics award for “Best Innovation in Natural Language Processing” in technology at the AI Summit in New York, which recognizes companies that stand ahead of the curve by adopting NLP into their organization.

As 2021 unfolds, Phoenix will continue to enhance our Advertising and Brand measurement solutions, including the ongoing incorporation of Artificial Intelligence technology into our solutions and enhanced insight platforms for communications and brand insights.
C SPACE**

Jessica DeVlieger
President, Americas
B.A., Cornell University

cspace.com | Founded: 1999

2020 U.S Revenue: $65.0 million
Percent Change from 2019: -7.1%
2020 Non-U.S. Revenue: $15.0 million
Percent from Outside U.S.: 18.8%
2020 Worldwide Revenue: $80.0 million
U.S. Employees: 345

U.S. Headquarters: Boston, MA
Other Offices: Multiple offices in the U.S. as well as in Mexico City, London, and Shanghai

We work with some of the world’s best-known brands – like Walmart, Samsung, IKEA and more – to build customers into the ways companies work and deliver on “Customer Inspired Growth”. By building authentic, ongoing relationships with customers – online and in-person – brands can stay relevant, deliver superior experiences, launch successful products, and build loyalty. Through our Customer as a Service approach in research, consulting, and communications, we help businesses minimize risk and maximize growth.

We integrate customers into the ways our clients work. By bringing stakeholders together around the customer, our clients create greater clarity and alignment in the actions that will most effectively drive customer growth.

C Space’s customized programs are tailored based on specific business needs and include private online communities, immersive storytelling, data & analytics, activation events, innovation projects and business consulting.

C Space continues to invest in its people, existing capabilities like data & analytics, as well as new initiatives.

**Some or all figures are not made available by this company so instead are based on research and estimation by the Report author

FMG (FORS MARSH GROUP)*

Ben Garthwaite
CEO
MBA, Robert H. Smith School of Business, University of Maryland

forsmarshgroup.com | Founded: 2002

2020 U.S. Revenues: $61.0 million
Percent Change from 2019: 6.1%
2020 Non-U.S. Revenue: --
Percent from Outside U.S.: --
2020 Worldwide Revenue: $61.0 million
U.S. Employees: 344

U.S. Headquarters: Arlington, VA

Fors Marsh Group (FMG) uses business as a force for good. Since 2002, we have applied science and strategy to create positive behavior change in people and program improvements in government. This work is conducted within seven U.S. markets: health, defense, technology, finance, homeland security, policy, and consumer. As a B Corporation, FMG governs from a unique set of values that compound the positive impact achieved for employees, clients, and partners.

In 2020, we invested in the expansion of our research panels with the acquisition of the Veterans Research Network, which focuses on military veterans, their families, and caregivers. Our client portfolio also expanded through new partnerships with the U.S. Department of Health and Human Services’ (HHS) Office of the Assistant Secretary for Public Affairs (ASPA), the Consumer Financial Protection Bureau (CFPB), the U.S. Department of Homeland Security’s (DHS) Office of the Chief Human Capital Officer (OCHCO), the National Institutes of Health (NIH), the National Science Foundation (NSF), and the Army National Guard.

In the private sector, FMG partners with leading organizations such as the Democracy Fund, Nielsen, Military Times, and Gensler. Three specific examples of FMG’s impact in 2020 include:

- Spearheaded a public awareness and education campaign for HHS ASPA to disseminate accurate public health
FMG provided the data and analysis required for policies and legislation to be created to eliminate these negative behaviors.

FMG has earned the following certifications: Virginia Values Veterans (V3), International Organization for Standardization (ISO) 9001, and ISO 14011. These certifications validate FMG’s efforts to continually improve our business processes, diversify our staff of experts, invest in creating high-quality impactful work, and ensure our footprint is environmentally sustainable.

* % Change calculation reflects adjustment of previously reported 2019 U.S. research revenue due to acquisition/divestiture activity or other business change during 2020.

National Research Group (NRG), acquired by Stagwell Group from Nielsen in 2015, is a leading global insights and strategy firm at the intersection of entertainment and technology. Rooted in four decades of industry expertise, the world’s leading marketers turn to us for insights into growth and content strategy. working at the confluence of content, culture and technology, NRG offers bold insights for storytellers everywhere.

Some agencies specialize in qual, others focus on quant - but we connect the two disciplines with hybrid teams expert in both modalities. We’re a one-stop, custom consultancy that tailors our approach to solve your biggest challenges.

The foundation of our qualitative work is a team of passionate, subject matter experts who connect deeply with consumers in any environment. NRG’s qual services include: Focus Groups, In Depth Interviews (IDI’s), Ideation & Co-Creation Workshops, Expert Think Tanks (Roundtables), In-person Intercepts, Ethnography, and Influencer Meetups.

We use QUAL to discover the subconscious drivers that fuel our quantitative truths. Our quantitative work is anchored in sophisticated techniques with a focus on agility, creativity and rigor. We are method agnostic and work collaboratively with you to solve complex problems in a simple way. NRG’s quant services include: Ad & Campaign Effectiveness, Attitude & Usage, Brand Management, Concept Development, Creative Testing, Customer Satisfaction, Forecasting & Demand Planning, Path-to-Purchase, Positioning & Messaging, Price & Feature Optimization, Segmentation, and Tracking.

Storytelling is at the heart of what we do. We synthesize disparate data into memorable, easy to understand, actionable narratives that empower our client to make informed decisions. Our final deliverable works hard so you don’t have to.

NRG has offices in North America, the United Kingdom, France, Germany, Italy, and Spain. As well as, Russia, China, Japan, South Korea, and Australia.

**Some or all figures are not made available by this company so instead are based on research and estimation by the Report author**
Is Your Company’s Research Quality Process Management System Best-in-Class?

Recently updated to meet the changing needs of those working in market research, insights and data analytics, the new ISO 20252 standard provides a framework that helps ensure a consistent level of quality across offices, project teams and outsourced suppliers.

“ISO certification is simply the most powerful way for insights companies to secure real operational improvements and market differentiation.”

Craig Overpeck, Group Chief Operating Officer at P\S\L Group

Through the Certification Institute for Research Quality (CIRQ), a successful audit and certification to ISO 20252 establishes guidelines that ease training, transitions, and trouble-shooting. Companies that go through implementation create a Research Process Management System which maximizes quality and efficiency, while reducing duplication of work and overall cost.

Certification demonstrates to existing and potential clients that your company takes quality and compliance seriously.

ISO 20252 is an internationally coveted credential proven to:

• Increase revenue via less re-work, improved employee efficiency and greater client satisfaction
• Improve employee morale and training
• Lower risk from systematic data protection and security controls

As an insights and data analytics business leader, it is essential that you provide an efficient research quality process management system to serve your clients. Contact Juliana Wood, CIRQ’s Director of Certifications, at (202) 800-2545 today to learn more about how certification to ISO 20252 can give your organization a competitive edge.

Visit cirq.org for more information.
Hanover Research is a brain trust designed to level the information playing field. Hanover is made up of hundreds of researchers who support thousands of organizational decisions every year. One of the industry’s fastest growing companies, Hanover attributes this market success to its unique positioning as the only firm that provides tailored research through an annual, fixed-fee model.

Hanover serves over 1,000 organizations and companies worldwide from established global organizations, to emerging companies to educational institutions. From CEOs and CMOs to Superintendents, Provosts and Chief Academic Officers, to VPs of Finance and Heads of Advancement, our research informs decisions at any level and across any department capitalizing on the exposure to myriad industries and challenges.

Founded in 2003, Hanover operates on an annual fixed-fee model, and partnership provides our clients with access to a team of high-caliber researchers, survey experts, analysts, and statisticians with diverse skills in market research, information services, and analytics. There is no limit on the type of challenge that can be solved; Hanover utilizes quantitative and qualitative approaches to deliver solutions – most of which are very difficult to replicate internally.

### Custom Research Services:
- **Secondary Research:** market segmentation and evaluation; labor and demographic trends and forecasts; vendor and product reviews; best practices reports.
- **Survey:** design, administration, and analysis; open-ended response coding.
- **Qualitative Primary Research:** focus group design and administration; in-depth interview design, outreach, administration and analysis.
- **Data Analysis:** data segmentation and mining; conjoint analysis; linear regression; descriptive and predictive analytics; data forecasting and modeling.

### Core Practice Areas:
- **Hanover’s Corporate practice** drives growth with a customer-centric lens on which markets to enter, product to develop, messaging to refine, and sales strategy to deploy.
- **Hanover’s Higher Education** provides key insights across both academic and administrative areas, including enrollment management, academic development, student experience, finance, advancement, marketing, and grants solutions.
- **Hanover’s K-12 Education practice** provides key insights for leadership across instructional and administrative departments including ensuring college and career readiness, evaluating programs, building safe and supportive environments, engaging families and communities, recruiting, retaining and developing talent, and improving operations.
Customers wants and needs change fast; if you’re not listening and making changes based on their feedback, there’s no way you will be able to keep up. Your competitors are constantly evolving and innovating, too. As a leading customer experience management (CEM) firm, SMG helps you get smarter about your customers and employees to drive changes that boost customer loyalty and improve business performance. We combine technology and services to collect, analyze, and share feedback and behavioral data—so it’s easier for you to deliver and activate customer insights across your enterprise.

SMG partners with more than 350 brands around the globe to create better customer and employee experiences, which drive loyalty and performance. SMG uniquely combines technology and insights to help clients listen better, act faster, and outperform competitors. SMG is a technology-enabled research firm with a global footprint—evaluating over 150 million surveys annually, in 50 languages across 125 countries.

Strategic solutions include omniCX, Brand Research, and Employee Engagement. SMG’s omniCX solution uses multiple research methodologies in capturing solicited and unsolicited consumer feedback across in-store, online, contact center, and social channels. Results are aggregated and reported via smg360—a real-time, role-based reporting platform providing access to all customer and related data.

SMG’s research professionals partner with clients to derive business-changing insights. Within Brand Research, SMG offers traditional brand tracking as well as access to dynamic customer and competitor data through market intelligence tool BrandGeek. Fueled by SurveyMini—SMG’s location-based mobile research app—BrandGeek contains consumer feedback and behavioral data relating to 4,500+ brands across 500,000+ locations.

SMG’s Employee Engagement solution helps clients understand and manage the entire employee life cycle—with onboarding, core engagement surveys, and exit. SMG’s integrated program includes goal setting, survey design, reporting, analytics, action-planning, and follow-up.

**Some or all figures are not made available by this company so instead are based on research and estimation by the Report author**
experience, and our clients’ financial KPIs.

- Measurement channels: mystery shopping, customer experience surveys, contact center calls, social media, employee engagement surveys
- KnowledgeForce® technology platform and Eyes:OnTM mobile app
- Predictive Analytics to determine what matters most and the ROI for investing in improvements
- Market Research services (e.g., customer segmentation, Attitude Trial and Usage studies, custom research projects)
- Strategic Advisory Services to design and implement effective measurement systems and improve performance

**Some or all figures are not made available by this company so instead are based on research and estimation by the Report author**
SSRS is a full-service market and survey research firm led by a core of dedicated professionals with advanced degrees in the social sciences.

SSRS surveys support numerous media and academic partners looking to report on public attitudes and beliefs about a wide range of salient issues such as elections and public policy. SSRS is the polling partner for CNN, and conducts public opinion polling for ABC News, The Washington Post, POLITICO and CBS News.

Beyond national polls, SSRS regularly conducts research at a state-level, and among subpopulations such as Latinos and political partisans, and specializes in reaching hard-to-reach and low-incidence populations. SSRS has extensive experience in public policy, public affairs, and health policy research. Since the Affordable Care Act was signed into law, SSRS has completed numerous studies surrounding its implementation and assessing Americans’ attitudes and experiences with the law. Since 2016, SSRS conducts the monthly Kaiser Family Foundation Health Tracking Poll. SSRS is well-known for its weekly telephone Omnibus poll. The firm also offers the SSRS Opinion Panel, that allows clients to conduct probabilistic surveys quickly, at low costs. The SSRS/Luker on Trends Sports Poll is the first and longest-running tracking study focusing on sports in the United States.

This year, the Coronavirus crisis created unprecedented challenges for the sports and leisure industry. To help clients and partners monitor and respond to these issues, the SSRS/LoT Sports Poll conducted a series of ongoing reports measuring the impact of the COVID-19 crisis on Americans. The reports, which have been released publicly, include: “The Impact of Coronavirus on American Sports Fans”, “The Impact of Coronavirus on Americans: Feelings of Safety in Groups”, “COVID-19 and Attending Events Today”, and more.

* ‘% Change’ calculation reflects adjustment of previously reported 2019 U.S. research revenue due to acquisition/divestiture activity or other business change during 2020.
Our 2021 initiatives to fuel brand growth for our clients include:

- Leverage our Brand Growth Navigator framework to help support clients along their respective growth journeys
- Build out the front-end offerings of our InnovationSprint™ solution
- Enhance our information design capabilities so clients can easily take action on the results
- Focus on driving deeper insights by combining our advanced analytics strength with immersive customer understanding in our designs
- Expand our solutions through the integration of new technologies and behavioral approaches
- Share our knowledge at leading industry conferences on topics ranging from big data, implicit association vs. max/diff, brand tracking, and segmentation.

Deloitte Brand Operations Services (formerly LRA, a Deloitte business) is a leading global provider of Customer Experience Measurement services for multinational companies with complex customer interactions. Our innovative brand standard audits, quality assurance inspections, mystery shopping programs, research, and consulting services have helped clients deliver consistent, memorable, and differentiated experiences to their customers. Our clients include many of the world’s preeminent global hospitality brands, as well as companies in the gaming, dining, healthcare, sports and entertainment, real estate, retail and travel industries.

Deloitte’s Brand Operations Services offerings focus on helping clients to define and measure the “current state” of the customer experience and then identify measures to enhance or reinvent that experience in order to drive customer satisfaction, loyalty and advocacy and positive customer outcomes and behaviors.

Services include:

- Field/Operational Research
- Audits and Inspections (Quality Assurance, Brand Standards, Operational Excellence, Emotional Audits, etc.)
- Mystery Shopping (Service, Sales, Operations, Brand) Customer/Employee Research
- Qualitative/Exploratory Research (Focus Groups, IDIs)
- Customer “Tracking” Survey Research
- Customer “Relationship” Studies
- Employee Engagement Studies
- Conjoint/Decision Modeling Studies
- Customer Segmentation & Personae Development Studies
- Touch Point/”Moment of Truth” Focused Surveys
- Modeling the “Emotional Connection” of customers to company and its impact on behavior, spending and share of wallet.
We are somewhat unique in the industry for our focus on gathering the field and operational data via our audits, inspections and mystery shopping offerings. This capability allows us to complement the sentiment/directional data gathered from customers. With this granular specific data, we’re able to provide insight on how an operation is running or an experience is being delivered in the field.

**Some or all figures are not made available by this company so instead are based on research and estimation by the Report author**

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### BVA GROUP

### Pascal Gaudin

**Director General**

**MS, Toulouse University of Social Sciences**

bva-group.com/en | Founded: 1970

<table>
<thead>
<tr>
<th>2020 U.S. Revenues:</th>
<th>$34.0 million</th>
</tr>
</thead>
<tbody>
<tr>
<td>Percent Change from 2019:</td>
<td>-10.5%</td>
</tr>
<tr>
<td>2020 Non-U.S. Revenue:</td>
<td>$180.0 million</td>
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<tr>
<td>Percent from Outside U.S.:</td>
<td>84.1%</td>
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<tr>
<td>2020 Worldwide Revenue:</td>
<td>$214.0 million</td>
</tr>
<tr>
<td>U.S. Employees:</td>
<td>150</td>
</tr>
</tbody>
</table>

**U.S. Headquarters: Teaneck, NJ**

**Other Offices: New York, Chicago, and France, Germany, United Kingdom, Italy, Hong Kong, China, Switzerland, Chile, Australia**

BVA Group is a research and consulting firm, expert in behavioural science, headquartered in France, with offices in the U.S., U.K., and many other countries. BVA brings data to life and converts deep understanding of customers and citizens into behaviour change strategies. We operate both for public and private clients with methodologies fuelled by data and behavioural science.

Our FMCG specialist--PRS IN VIVO--is a global leader in packaging and shopper research. PRS IN VIVO helps consumer marketers to succeed through:

- In-store and online studies to better understand shopper behavior, in both physical and e-commerce shopping contexts;
- Qualitative studies to develop, screen and refine new product, packaging and merchandising concepts;
- Quantitative studies to pre-test and quantify new packaging, merchandising and display systems (for physical stores and e-commerce);
- Volume forecasting and product testing for both Innovations and Brand Re-Stages; and
- “Nudge” initiatives to facilitate behavioral change, create new consumer habits and drive category growth.

BVA Group is a European leader in Customer Experience research (feedback-management, mystery-shopping, quality monitoring, customer satisfaction & NPS and ethnography). More than 100 leading brands use our behavioural insights to provide seamless shopper journeys and design successful new products and services, including solutions from our multi-awarded Global Nudge-Unit.

In January 2021, BVA Group sold off the U.S. entity of PRS IN VIVO to Alcentra but maintained ownership of PRS IN VIVO Europe and Asia. PRS IN VIVO USA has been rebranded as Behaviorally.

**Some or all figures are not made available by this company so instead are based on research and estimation by the Report author**

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### MARKETVISION RESEARCH

### Tyler McMullen

**President and CEO**

**MBA, University of Virginia**

mv-research.com | Founded: 1983

<table>
<thead>
<tr>
<th>2020 U.S. Revenues:</th>
<th>$33.9 million</th>
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<td>Percent Change from 2019:</td>
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<td>2020 Non-U.S. Revenue:</td>
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<td>Percent from Outside U.S.:</td>
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</tr>
<tr>
<td>2020 Worldwide Revenue:</td>
<td>$33.9 million</td>
</tr>
<tr>
<td>U.S. Employees:</td>
<td>142</td>
</tr>
</tbody>
</table>

**U.S. Headquarters: Cincinnati, OH**

**Other Offices: Multiple offices in the U.S.**
MarketVision Research is a full-service marketing research firm, providing clients with actionable insights about their markets, customers, brands and products. Areas of focus include product and portfolio development, pricing, branding, segmentation and customer experience. The company offers a full suite of quantitative and qualitative research capabilities and works across industry groups. The firm invests significantly in its education program, sharing findings with the research community.

MarketVision leads a variety of training and development programs for clients and individuals. The Research on Research program explored the following topics in 2020:

- **Next Generation**: Research to understand keys for improving research and brand engagement with this audience. Second round of research to explore pandemic response by brands and the impact on Next Gen audiences.
- **Healthcare Services**: Understanding the impact of new trends and the consumerization of healthcare services with consideration for the opportunity for non-healthcare brands in the space.
- **Direct to Consumer**: Conducted multiple rounds of research to understand the adoption of DTC brands before and after COVID-19. From CPG to Healthcare, the adoption of DTC has accelerated during the pandemic and fundamentally changed consumer behavior.

Unique Capabilities:

- **Optimization**: MarketVision’s Marketing Sciences group is recognized for its discrete choice modeling and optimization regarding product and service development, branding, packaging and pricing.
- **Online Communities (MROCs)**: MarketVision’s proprietary communities’ solution has been in place since 2007. The MROC platform was developed in-house and customized to clients’ specific needs.
- **Hybrid Research**: MarketVision has over 20 in-house moderators and marketing science professionals, as well as global project managers, to facilitate qualitative and quantitative research seamlessly.

2020 Activities: In addition to the training and development programs mentioned above, MarketVision participated and spoke at industry conferences including Insights Association and Quirks Event. MarketVision’s colleague, Ashley Paulson, received the 2020 QRCA Young Professionals Award. We created videos and an online video blog for on-going sharing of insights.

To maintain business continuity, MarketVision successfully pivoted operations during the pandemic, serving clients and their existing and new needs for insights, thereby achieving positive year-over-year growth.

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### CHADWICK MARTIN BAILEY (CMB)

**CHADWICK MARTIN BAILEY**

**James Garrity**

**CEO**

MBA, Babson College

cmbinfo.com | Founded: 1984

2020 U.S. Revenue: $27.8 million
Percent Change from 2019: -3.1%
2020 Non-U.S. Revenue: --
Percent from Outside U.S.: --
2020 Worldwide Revenue: $27.8 million
U.S. Employees: 94

**U.S. Headquarters: Boston, MA**

Chadwick Martin Bailey (CMB) is an insights and strategy firm that helps global brands engage, innovate, pivot, and grow amid disruption. The company leverages advanced analytics, consumer psychology, and market strategy to implement organizational initiatives, with a focus on enterprise planning, product & service development, loyalty & advocacy, and brand health.

For over 35 years, CMB has helped the most successful brands and their executives give voice to their market through business decision strategies, creativity, consultation, and flawless execution. Serving clients in Financial Services, Media & Entertainment, Tech & Telecom, and Healthcare industries, the CMB team has a wealth of expertise decoupling the complex, and evolving technological, social, cultural and economic forces to uncover opportunities and create positive, sustainable change.

In 2020, CMB remained a valuable partner to its clients throughout a time of great uncertainty. In spite of the immense challenges
the industry faced, the firm was laser focused on the needs of their clients, navigating them through unique organizational circumstances, while demonstrating incredible flexibility and tenacity.

CMB will continue its commitment to human-centered research & storytelling, conduct self-funded research in alternative payments, young investor trends, and 5G, and increase research & development efforts in machine learning and AI.

THE LINK GROUP

Brad Camrud
President
Masters in International Marketing from Thunderbird

Tom Pfeil
Co-Founder and Partner
MBA, University of Texas at Austin

The Link Group (TLG) executes research for Fortune 500 firms in the healthcare, retail, CPG, and finance industries across both qualitative and quantitative methodologies around the globe. We attribute our success to our core business philosophy: Smarter Research and Better Service. Our commitment to Smarter Research has allowed TLG to take a creative, custom approach to our clients’ business needs that results in actionable and insightful reports. We deliver Better Service by maintaining a consistent research team across projects, allowing the team to anticipate and respond to client needs. This business philosophy of Smarter Research and Better Service has resulted in 99% of revenue coming from repeat clients.

Ultimately, our success comes down to our people. We hire an inquisitive brand of outgoing problem solvers and give them the autonomy and flexibility they need to succeed in a highly collaborative environment. Because of our company culture and such benefits like paid maternity / paternity leave and a structured mentorship program, we boast an extremely low turnover rate of just 4%, which allows us to build strong client relationships and leverage fundamental knowledge to deliver more strategic insights for our clients.

This past year, we have continued to hone our research approaches to help elevate traditional research methods. For our Messaging and Positioning work, we have developed a framework which triangulates quantitative survey data to determine how well messaging concepts will activate, communicate, and engage the customer. In our Segmentation studies, we blend science and art to create models which align with the client’s brand strategic vision by creating differences that are meaningful and actionable from a marketing perspective. And we have leveraged our knowledge of behavioral economics to develop a validated, proprietary quantitative methodology, LinkEQ, which allows us to reveal latent emotional associations.

EDELMAN DATA & INTELLIGENCE (DXI)

Yannis Kotziagkiaouridis
Global Chief Data and Analytics Officer
MBA, The University of New Haven

edelmandataintelligence.com | Founded: 1999

Edelman Data & Intelligence (DxI) is a global, multidisciplinary research, analytics and data consultancy of Edelman -- the world’s
largest global communications firm. Based in New York, NY, with employees in 27 offices internationally, DxI is composed of over 350 research specialists, business scientists, data engineers, behavioral and machine-learning experts, and data strategy consultants based in 15 markets around the world.

Previously Edelman Intelligence (EI), the company reorganized in the summer of 2020 as Edelman DxI, brings together the research and analytics capabilities of EI, with Edelman’s predictive, performance, data consulting and technology talent into one cohesive global organization. This structural change helps integrate the necessary people-based PR, communications, social, research and exogenous data, as well as the technology infrastructure, to create, collect, store and manage first-party data and identity resolutions.

The launch of Edelman DxI reflects Edelman’s strategic focus to use data and intelligence to drive empathetic, transparent, and actions-based communications - allowing for more focus on regional operations and client centricity, while creating close communities across capabilities and shared access to technology and data.

Edelman DxI’s focus areas include:

- **Human Intelligence** (research, social listening, social sciences)
- **Predictive Intelligence** (econometrics, psychometrics, modeling and data science)
- **Performance Intelligence** (audience development, targeting, paid/performance marketing and digital analytics)
- **Consulting** (consulting roadmaps and intellectual 2 property development)
- **Data & Products** (tools, platforms, AI and machine learning expertise)

This past year Edelman DxI has grown tremendously. As of July 1, 2020, the Company’s fiscal year, the organizational alignment transferred resources from related entities to DxI, which included analytics personnel and contributed to increased revenues.

For 2021 and beyond, the company is focused on continuing this momentum in key areas, including the advancement of our Edelman Trust Management (ETM) capabilities through new products and offerings focused specifically on providing guidance for measuring and building trust in brands, as well as leveraging performance and predictive analytics tools to enhance the value we bring to clients.
integrative perspective on business problems. The firm also builds custom panels for B2B markets.

Project leaders with sector experience and research proficiency are supported by in-house methodologists and a wide portfolio of advanced analytic tools including proprietary modeling services and software, all of them highly customized. The firm continues to invest significant resources in intellectual capital to enhance enterprise decision support with cutting-edge methods, including specialized “small data” choice models, new predictive techniques using Big Data, and brand-customized text analytics. Its Farsight® suite supports the building of highly dynamic models capable of producing forecasts for complex market scenarios including paradigm-shift technologies and market monitoring programs, that provides forward-looking perspectives guiding timely market interventions.

Other services include litigation and regulatory support, often involving expert testimony in cases involving trademark confusion, deceptive advertising, and brand equity. NAXION’s strong commitment to operational excellence is reflected in ISO certification and in-house operations capabilities to deliver exceptional levels of quality control.

**Some or all figures are not made available by this company so instead are based on research and estimation by the Report author**

**MARU GROUP**

**Ged Parton**  
CEO  
MA, Oxford University

maru/matchbox®

*arugroup.net  |  Founded: 2016*

2020 U.S. Revenues:  $22.1 million  
Percent Change from 2019:  -21.9%  
2020 Non-U.S. Revenue:  $16.6 million  
Percent from Outside U.S.:  42.9%  
2020 Worldwide Revenue:  $38.7 million  
U.S. Employees:  58

U.S. Headquarters: Chicago, IL  
Other Offices: New York, San Francisco, Los Angeles; Vancouver and Toronto in Canada; London and Southampton in United Kingdom; Buenos Aires in Argentina

Maru is a world leading CX and Insights Software & Advisory Services company. Maru was founded to disrupt the data and insight delivery industry with a combination of Software & Advisory Services delivering data in real-time via a unique service model.

Maru helps its clients make informed decisions in near real-time by combining proprietary software, deep industry experience and access to the best minds in research. Maru’s flexible service model means our clients can choose to self-serve our software directly to create, launch and analyze projects; or choose to utilize our Software with knowledgeable support from insights experts. Maru successfully delivers major national and international CX and CEM programs for Enterprise organizations.

In 2020, we continued to invest in our software capabilities. We launched multiple capabilities including Conversational AI, Instant Qual Environment, Advanced Analytics expansion, AI tools within our Unstructured Data Engine and new System 1 based question types like Implicit Association Testing. We added further IP in the form of new solutions for concept screening and ideation. We invested in our panel assets via a new Technology Advisory Council consumer panel, a global sample quality certification program, and a Public Opinion Research channel. And we launched a new book titled Eureka! The science and art of insights.

Our focus in 2021 is to continue to build upon our software ecosystem and to introduce new System 1 based IP and apps embedded in our ecosystem. We will continue to expand our platform self-serve capabilities and add significant new capabilities to our Instant Qualitative environment and our Agile Survey software. We are investing significantly in our tracking IP – we have launched a new approach to brand tracking in Q1 and we will be focusing on System 1 in CX. We are launching Emotion in CX, a method to introduce new emotion-based metrics to enhance existing CX programs by diagnosing the emotional relationship.

* % Change calculation reflects adjustment of previously reported 2019 U.S. research revenue due to acquisition/divestiture activity or other business change during 2020.
Camille Nicita  
President and CEO  
MBA, Wayne State University

gongos.com | Founded: 1991

2020 U.S. Revenues: $20.1 million  
Percent Change from 2019: -16.9%  
2020 Non-U.S. Revenue: --  
Percent from Outside U.S.: --  
2020 Worldwide Revenue: $20.1 million  
U.S. Employees: 118

U.S. Headquarters: Royal Oak, MI

Gongos, Inc. is a consultative agency that places customers at the heart of business strategy. Partnering with insights, analytics, marketing, strategy, and customer experience groups, Gongos operationalizes customer centricity by helping companies understand and activate customer needs. Gongos works alongside B2C and B2B companies in guiding strategy, insights, innovation, and transformation initiatives.

From product development, to customer experience, to marketing optimization, Gongos helps organizations enhance customer retention and acquisition. Spanning the entire customer centricity value chain, Gongos’ consultative approach ensures internal adoption and implementation that inspire customer-committed cultures. Through its mission to reorient the relationship between customers and corporations to create mutual value, Gongos leverages two key pillars; its Customer as a Stakeholder™ service model aims to enhance engagement strategies to ensure a more authentic fusion of the customer into corporate decision making. And, its patent-pending Value Exchange Model™ which enables companies to gain marketplace advantage by strengthening Customer Performance Indicators. The model identifies explicit linkages between outcomes valued by customers and Customer Lifetime Value.

Gongos will launch its syndicated reports based on data from the model in 2021. The charter syndicate comprises 168 brands across the digital services, direct-to-consumer, eCommerce, sharing economy, and top-performing brands categories.
Our experts include business strategists with client-side experience, qualitative specialists, and experienced analytic professionals. KS&R creates and executes global custom marketing research solutions for some of the best-known corporations in the world (in more than 120 countries and 50 languages), including many of the emerging nations across Asia, Africa, and South America.

In 2020, KS&R leveraged our expansive network of pharmacy panels to build world-class capabilities for pharma inventory measurement and healthcare insights. Our marketing scientists have driven marked advances in pricing decision support, which have now been validated by positive in-market results. KS&R continues to support our clients as they drive thought leadership in their ecosystems, with data-directed guidance around branding, new solutions, and messaging. We have expanded our portfolio to include insights fusion across multiple channels of content (primary research, social media, web-based information, etc.).

And, in January 2021, we officially introduced Tumble, our team of innovation, customer experience and design experts who combine rock-solid research with the latest human-centered design approaches. As we look forward, KS&R will be introducing new approaches to quantify emotion and empathy, expand our capacity in customer/user experience and design, and continue to invest in innovation for insights visualization, mobile and virtual engagement and advanced technologies (machine learning, RPA, and AI).

* '% Change' calculation reflects adjustment of previously reported 2019 U.S. research revenue due to acquisition/divestiture activity or other business change during 2020.

Jeff Seltzer
CEO and Co-Founder
M.A., San Diego State University

Maria Vallis
Managing Partner
MA, University of Melbourne

hypothesisgroup.com | Founded: 2000

| 2020 U.S. Revenue: | $19.1 million |
| Percent Change from 2019: | 4.4% |
| 2020 Non-U.S. Revenue: | -- |
| Percent from Outside U.S.: | -- |
| 2020 Worldwide Revenue: | $19.1 million |
| U.S. Employees: | 64 |

U.S. Headquarters: Los Angeles, CA
Other Offices: Seattle

Hypothesis uses insights, strategy, and design to help important brands do amazing things. We specialize in tough, high-profile questions that take creative, multi-dimensional approaches with a broad business perspective.

Our approach combines inventive consumer-centric qualitative research, advanced analytics, strategic thinking, and data visualization. Our award-winning Design team translates complex information into compelling, easy-to-understand deliverables to socialize learnings and engage teams. Our client list includes many of the highest value, fastest growing brands in the world, with a special focus on industry innovators and category disruptors.

While we help our clients explore and address a wide array of business challenges, our greatest areas of concentration revolve around brand strategy and positioning, product and offer innovation, customer experience, creative and content development, business culture and purpose. We always do this with an eye toward our clients’ business growth.

In 2020, we experienced an increased demand for highly customized strategic engagements to help our clients deal with the disruption, challenges and opportunities resulting from the pandemic. This fueled growth in our Momentum strategy division and in large-scale foundational, exploratory and future planning work. Our teams pivoted quickly to a remote and digital-first environment, successfully conducting new types of online qualitative, co-creation, ideation workshops and digital marketing playbooks.

As we enter the post-pandemic world, we will continue to embrace and build upon these new ways of working. In 2021, we will
continue to focus on helping our clients do amazing things. Our
growth priorities include attracting new and diverse talent to
round out our teams, deepening client relationships, expanding
our Momentum strategy division, engaging with clients in thought
leadership, and establishing complementary partnerships to fuel
growth.

50

BELLOMY RESEARCH*

John Sessions
CEO
MBA, Wake Forest University

bellomy.com | Founded: 1976

2020 U.S. Revenue: $15.5 million
Percent Change from 2019: -18.4%
2020 Non-U.S. Revenue: --
Percent from Outside U.S.: --
2020 Worldwide Revenue: $15.5 million
U.S. Employees: 106

U.S. Headquarters: Winston-Salem, NC

Bellomy, based in Winston-Salem, N.C., is a privately held, family-
owned, full-service market intelligence company. Bellomy focuses
on driving successful business outcomes through the design and
delivery of solutions that yield deeper customer understanding. We
surround our clients’ business challenges with an unparalleled mix
of knowledge and experience, marketing science, and proprietary
research technology.

Our work involves both B2C and B2B environments—with
qualitative and quantitative insight solutions spanning market
segmentation, customer experience and journeys (including digital
user experiences), brand equity, product innovation, shopper
insights, marketing optimization, social research platforms, and
research technology. We work with clients across a broad range
of categories and industries including consumer packaged goods,
financial services, automotive, retail, restaurant and hospitality,
telecommunications and technology, apparel/textiles, utilities,
healthcare, insurance, and home improvement.

Bellomy serves as an extension of its clients’ marketing research
and customer experience departments by integrating a broad set of
capabilities and areas of expertise, including:

- Segmentation—a collaborative, outcome-oriented
  approach to segmentation, ensuring actionable segments
  that are stable, meaningful, differentiated, and embraced.
- Customer (and digital) Experience—combining
  marketing science and technology creates our systematic
  approach to understanding and measuring differentiated
  customer experiences.
- Shopper Insights—our approach to understanding
  shoppers and the “why” behind consumer behavior.
- Social Research Platforms—engages customers and key
  stakeholder communities via a broad array of activities
  including discussions, quick polls, surveys, video chats,
  and digital diaries.
- Brand Equity—measuring and understanding a brand’s
  place in the hearts and minds of the market provides
  direction on how to convert prospects to customers and
  increase devotion to the brand.
- Product Innovation— design, optimize, and validate
  innovation with insights at every stage.
- Marketing Optimization—tools to define the optimal mix
  of product, price, package, and messaging.

In addition, Bellomy clients are able to leverage SmartIDEAS™,
our enterprise consumer knowledge and insight platform.

Bellomy is a founding sponsor of the Center for Retail Innovation
at the Wake Forest University School of Business and a member of
UGA’s Advisory Board in the MMR program. Bellomy has client
service offices in Boston, Cincinnati, Dallas, and Los Angeles.

* % Change calculation reflects adjustment of previously reported 2019 U.S.
research revenue due to acquisition/divestiture activity or other business change
during 2020.