ESOMAR’s
Global Top 50
Insights Companies 2022

Presenting the leaders of the industry

ESOMAR’s Intelligence Unit
July, 2022
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ESOMAR is the global voice of the data, research and insights community.

With more than 6,000 individual members and over 550 corporate member companies in 130+ countries, we represent more than 40,000 professionals currently working in the data, research, insights, and analytics profession - and all those who use research for informed decision-making. ESOMAR has been providing ethical and professional guidance and advocating on behalf of its global membership community for over 75 years. To facilitate this ongoing dialogue, ESOMAR creates and manages a comprehensive programme of industry-specific and thematic events, publications and communications as well as actively advocating selfregulation and the worldwide code of practice.

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1. Industry overview

The increasing complexity of our industry is a testament to the surging global interest to understand humans and the world. This need has translated quite plainly into a landscape that is exciting as well as challenging. Post the grisly pandemic, 2021 witnessed a sectorial recovery fuelled by continuous growth of technology, aggressive consolidation of players, and dazzling levels of investment.

Join us to explore the ESOMAR’s Global Top-50 ranking of Insights companies, discover the underlying factors that keep the industry moving forward and the key players who were spotted surfing the wave.

1.1 Sectorial recovery

The global top-50 companies grew a combined 14% in 2021, after the sluggish growth registered in 2020. In fact, ESOMAR’s Global Market Research 2021 report, revealed the industry barely holding its ground in 2020 with a global net growth – after factoring in inflation – of 0.3% or a linear one of 1.7%, and an estimated turnover of almost USD 90 billion.

The strong performance of these companies, however, will likely see their combined market share increase slightly during 2021 as they surpass global rates of growth. Expected for publication in September 2022, the latest edition of this flagship report will confirm or refute these suspicions.

It is indeed clear that the industry has bounced back from the stifling uncertainty it experienced during 2020. As will be discussed later, the necessity many companies had of treading unexplored technological paths to deliver insights has proved promising for the industry and its future by attracting unprecedented levels of investment in 2021.
In recent years, the technological side of the industry has shown consistent levels of growth, generally surpassing the most established counterpart. As technological development seeps through all levels of society and means of production, it also profoundly changes the tools at the professionals’ disposal. Nonetheless, an unforeseen externality pushed the Insights Industry to rely more than ever on remote and passive methods of research.

As presented in the Lattice of Research from the 2021 edition of the Global Market Research report, the market share of technology-enabled methods of research grew by up to 4 percentage points over the course of 2020 to the detriment of established ones. The share of passive research grew by up to 10 points, thereby shrinking active research by almost the same amount. Increased reliance on these generally more quantitative tools of collection – as are for now the tech-enabled methodologies – caused this type of research to gain 2 points of market share compared to more difficult-to-execute qualitative research.

1.2 Growth of technology

Established research: Long used methodologies, with a proven track record and thoroughly refined over time. This type of research includes mail, telephone CATI (including CATI to mobiles, i.e. a person-to-person interview), face-to-face (PAPI / CAPI / mobile assisted), online quantitative research (including CASI – “self-interviewing “- and online panel), mobile / smartphone quantitative research, audience measurement, F2F Group discussions / focus groups, in-depth face to face interviews, ethnography.

Technology-enabled research: Methods that could not have existed without the advent of technology, such as online traffic / web analytics (includes content and digital tracking, CRM analytics and all advanced analytics), automated digital / electronic (includes retail audits, consumer household panels, location-based services, passive metering and log file processing), social media monitoring, online research communities (includes social media, in-depth interviews and online ethnography) and social media listening.
The swift adoption of technological tools caused the industry to transition to alternative business models. While at first the product was driven by the action – research, data collection, project scope – it has now transitioned to the specific tool that allows the emergence (or discovery!) of insights – SaaS – or the availability to crunch large datasets – DaaS. The inner workings of these vastly different business models add complexity to the industry, as well as unanticipated opportunities for corporate profitability.

Industrial segments like Digital Data Analytics or Social Listening and Communities (MarTech) grew at stupendous levels during 2021 and expanded by almost one-fourth over that year. MarTech growth, even during the pandemic, was not only positive but higher than other industry segments. Furthermore, companies related to these segments, traditionally focused in the USA, are progressively setting their expansion plans in Europe and Asia Pacific. More strategic insight into the future of the Insights Industry can be found in ESOMAR’s Evolution of the Data, Analytics and Insights Industry report with its latest edition, offering a forecast into 2024, scheduled for August 2022.

![Spend by established / technology-enabled research in 2020](source: Global Market Research 2021)

![Spend by active / passive research in 2020](source: Global Market Research 2021)
1.3 Consolidation of players

The number of mergers and acquisitions (M&A) in the industry has been fuelled by what until very recently has been easy access to capital and the need to expand the portfolio of products and services. In an attempt to remain competitive and to respond to the clients' needs and demands, companies have increasingly positioned themselves at the forefront of the technological wave. While some invested substantial sums into in-house development, others enjoyed the synergies obtained by targeted acquisitions aligned with their core (or intended) offer.

Probably the biggest arena for consolidation was found in the MarTech sector, where a number of the largest players declared notable growth originating from, precisely, mergers and acquisitions. The most representative example of this is Lightspeed with a growth of 227% over the year (as shown in the ranking).

Up to 40% of the turnover from the largest companies related to the MarTech sector was related to companies that had either been acquired or had acquired. Almost all the largest players with a significant turnover linked to Enterprise Feedback Management as well as Self-service Research Platforms had been involved in M&A activity. Most of the main Sample Panel Provider companies found themselves in a similar environment. This is just a glimpse of the momentum displayed in certain areas of the industry, to be explored in more detail in the upcoming edition of the Evolution of the Data, Analytics and Insights Industry.

All in all, up to 20 of the Top-50 companies in the ranking, which is almost 50% of the total turnover reported by the entire ranking (Chapter 3), saw a degree of M&A involvement in 2021.
1.4 Investment in the industry

Easy access to financial resources, high levels of industry consolidation, and sustained levels of capital return have turned the Insights Industry into an attractive ground for investors. 2021 seems to have positioned itself as the year where investors were piqued by the positive results and swift growth of remote and passive research imposed by the pandemic and facilitated in part by technology and platforms.

The Cambiar Capital Funding Index for 2021, shared in ESOMAR’s online magazine Research World, estimated investments at USD9 billion. The report also determined that the increased interest in in-house research by clients, the need for agile analysis and the track record of previous investment gems like Qualtrics or Momentive sparked an observed frenzy into platforms. In just the span of one year, investment in platforms went from representing 20% of total investment in 2020 to growing to a remarkable share of 48% in 2021.

These large levels of investment, coupled with incursions by investment firms into other consultancy businesses, provide a glimpse into the next realm with added value for the industry to leverage. Democratised data collection and movement towards democratising analysis point to services (consultancy, advisory, etc.) as the remaining pocket of excellent returns.

This notion still seems largely absent from many research agencies, as it is not uncommon for the reporting part of a project to be included in the budget at no extra cost. It is quite striking to think of all the added value that is being given for free while there is a parallel sector of the industry reaping sustained profits from these services.

ESOMAR’s Global Market Research report estimates around a quarter of the insights industry to be represented by the research services sector. Recognition of the potential of this sector holds even if its most traditional consulting firms report modest growth in comparison with the technology-enabled industry, a sector with no signs of saturation so far.
2. The ranking in perspective

2.1 Share of turnover globally

Since a final figure for global turnover for 2021 is being compiled by ESOMAR, preliminary calculations for the share of the Global Top-50 Insights Companies need the combined input of two of ESOMAR’s reports: the Global Market Research 2021 (September ‘21 but with a new edition expected for September ‘22), and the Evolution of the Data, Analytics and Insights Industry: a forecast into 2024, to be published in August 2022.

The reason is that the first provides the most faithful and complete picture of the global state of the established side of the industry, while the second will include updated data for 2021. By combining the two sources, we can add the current global turnover of the technology-enabled and reporting (or services) industry to the expected size of the established industry declared by the world’s countries last year.

The resulting turnover for 2021 is USD 111.51 billion: a globally established industry with a turnover of USD 39.97 billion, a technology-enabled one with a turnover of USD 43.97 billion, and lastly, a reporting sector with a global value of USD 27.57 billion. Please note that this is to be validated by the Global Market Research report, September 2022 edition.

This information enables us to estimate the share of the Global Top-50 Insights Companies to sit at 53.9%, a slight increase of decimal points to the level estimated for 2020.

It may come as a surprise that the share of the Top-50 largest companies has not increased further after a year with such consolidation and influx of capital as the one described above. This is a possible hint of the blooming health of the industry; while there is heavy consolidation at the top, developing areas still remain huge business opportunities. Investments in all segments of the industry paired with promising returns points in a yet unsaturated market.
2.2 Share per industrial sector

This sectorial fragmentation of the industry is a simplistic approach to the complex activity performed by companies. Most established firms have a substantial technological element in their revenue mix. Similarly, many firms that were born as software platforms now allow for deep analytical exercises. Companies that used to transform available secondary data into structured reports now have an established research branch for data gathering. The industry is complex, so we need a practical way to segment firms.

To successfully calculate the size of each sector in the industry, each company is assigned to one specific “realm” and its entire turnover is added to it.

The Global Top-50 Insights Companies are a mix of all these 3 realms: 37% of the turnover is taken by 14 companies related to the established industry, 30% is taken by 17 tech-enabled companies, and 33% by reporting companies.

It is possible to estimate the share of the largest companies within their assigned turnover segment. The attached figure gives a glimpse of the existing levels of consolidation within the industry, especially in the Reporting sector where firms like Gartner, IHS Markit, Deloitte, McKinsey & Co. and others hold prominent positions of leadership. They represent up to 73% (US$ 20.05bn) of the sector’s global turnover. On the other hand, the technology-enabled industry seems to have the largest room for consolidation, with leading companies representing a share of 41% (US$ 22.15bn).

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3 The portion related to the creation of insights, that is.
2.3 Fastest growing firms

As explained in the previous sections of this chapter, investment has played a significant role for many of the Top-50 companies. Nowhere is this more significant than for Lightspeed. With an increase of 227% in its turnover the MarTech (or Digital Data Analytics) company is a witness to the fast-paced capital outpour through rounds of investment and M&As after its 2020 IPO.

In second place and with a growth of 47% is another MarTech company, Hubspot, which surpassed a USD1 billion turnover in 2021 for the first time. This company, along with the growth of Salesforce and Adobe at the top of the segment (both at around 25%), has increased the growth of the Digital Data Analytics segment to 25%.

Qualtrics, placed within the Self-service Platforms sector, grew 41% over 2021. This was a result of a series of circumstances such as an IPO after a carve-out from parent company SAP, significant regional expansion into EMEA and Asia, as well as M&A activity involving Usermind, Clarabridge and SurveyVitals.

There are other significant fast-growing companies besides the top-3. Sitecore, for example, showed a growth of 30% after a significant round of financing above USD 1 billion as well as M&A involving Four51, Boxever and Reflektion. Other examples include Sprinklr with a growth of 27%, heading for an IPO, the Boston Consulting Group with 41%, the America Institutes for Research with 33%, Bain & Co. with 30% and Salesforce with 26%.

Surprisingly, 28 out of 50, or more than half of all companies, reported double-digit interannual growth. Of these, 15 companies grew between 10 and 20% (mostly consulting and industry reports firms), 7 grew between 20 and 30% (predominantly digital data analytics companies), 3 grew between 30 and 40%, 3 between 40 and 50%, and Lightspeed more than tripled in turnover (227%).

<table>
<thead>
<tr>
<th>2020/21 Growth</th>
<th>Number</th>
<th>Breakdown*</th>
</tr>
</thead>
<tbody>
<tr>
<td>10&lt;x≤20%</td>
<td>15</td>
<td>6 Industry Reports &amp; Research, 2 Digital Data Analytics, 2 Established Market Research, 1 Enterprise Feedback Management, 1 Social Listening &amp; Communities</td>
</tr>
<tr>
<td>20&lt;x≤30%</td>
<td>7</td>
<td>4 Digital Data Analytics, 1 Social Listening &amp; Communities, 1 Established Market Research, 1 Self-service Platforms</td>
</tr>
<tr>
<td>30&lt;x≤40%</td>
<td>3</td>
<td>1 Established Market Research, 1 Consulting Firms, 1 Digital Data Analytics</td>
</tr>
<tr>
<td>40&lt;x≤50%</td>
<td>3</td>
<td>1 Digital Data Analytics, 1 Self-service Platforms, 1 Consulting Firms</td>
</tr>
<tr>
<td>&gt;50</td>
<td>1</td>
<td>1 Digital Data Analytics</td>
</tr>
</tbody>
</table>

* While we recognise that some companies may have a portion of their business related to more than one segment, for purposes of feasibility in our calculations a company’s turnover is not split, and is instead assigned the segment that best describes their activity.

1Digital Data Analytics conforms, along with Social Listening and Communities, Self-serve Platforms and Enterprise Feedback Management, the Technology-enabled Sector.
Remarkably, only 3 of the Global Top-50 Insights Companies declared negative growth in the past year: INTAGE with -0.5%, McKinsey & Co. with an estimated -2.2%, and PwC with -4.8% (the last two calculated on a best effort basis given the private nature of the firms). It is worth noting that The Nielsen Company was split into two entities (from where NielsenIQ was born), making their alleged negative growth level rather a mathematical oddity.

2.4 Changes in the ranking

With an estimated growth of 227%, it shall come as no surprise that Lightspeed is the firm that has gained the most in 2021. The company goes from barely making the ranking to reasserting itself in 32nd position.

Other companies with significant gains are Sitecore and Qualtrics, each gaining 6 places for reasons mentioned before, Bain & Co. and Boston Consulting Group, each gaining 5, Hubspot, American Institutes for Research, Salesforce, Zeta Global and Medallia gaining 2, and Sprinklr, IQVIA and Gartner each gaining 1 position.

The remarkable jump by some of the companies means that a large number of firms actually drop places despite having presented positive growth over 2021. Up to 28 companies let go of one or more positions in favour of those who posited higher growth.

<table>
<thead>
<tr>
<th>Position in ranking</th>
<th>Breakdown*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Gaining places</td>
<td></td>
</tr>
<tr>
<td></td>
<td>5 Digital Data Analytics</td>
</tr>
<tr>
<td></td>
<td>2 Consulting Firms</td>
</tr>
<tr>
<td></td>
<td>2 Established Market Research</td>
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<tr>
<td></td>
<td>1 Enterprise Feedback Management</td>
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<td></td>
<td>1 Self-service Platforms</td>
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<td></td>
<td>1 Industry Reports &amp; Research</td>
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<tr>
<td></td>
<td>1 Social Listening &amp; Communities</td>
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<tr>
<td>Remaining</td>
<td></td>
</tr>
<tr>
<td></td>
<td>3 Industry Reports &amp; Research</td>
</tr>
<tr>
<td></td>
<td>2 Established Market Research</td>
</tr>
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<td></td>
<td>1 Consulting Firms</td>
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<td></td>
<td>1 Digital Data Analytics</td>
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<td></td>
<td>1 Social Listening &amp; Communities</td>
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<tr>
<td>Losing places</td>
<td></td>
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<tr>
<td></td>
<td>8 Established Market Research</td>
</tr>
<tr>
<td></td>
<td>6 Consulting Firms</td>
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<tr>
<td></td>
<td>6 Industry Reports &amp; Research</td>
</tr>
<tr>
<td></td>
<td>4 Digital Data Analytics</td>
</tr>
<tr>
<td></td>
<td>1 Enterprise Feedback Management</td>
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<tr>
<td></td>
<td>1 Sample Panel Provider</td>
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<tr>
<td></td>
<td>1 Self-service Platforms</td>
</tr>
<tr>
<td></td>
<td>1 Social Listening &amp; Communities</td>
</tr>
</tbody>
</table>

* While we recognise that some companies may have a portion of their business related to more than one segment, for purposes of feasibility in our calculations a company’s turnover is not split, and is instead assigned the segment that best describes their activity.
IQVIA is a global provider of advanced analytics, technology solutions and qualitative and quantitative bespoke and syndicated research services to the life sciences industry.

**Top C Level People:**

- **Ari Bousbib**
  Chairman & CEO

- **Ron Bruehlman**
  Executive Vice President & CFO

- **Trudy Stein**
  Executive Vice President & Chief Human Resources Officer

- **Karl Guenault**
  Senior Vice President & CIO

**Established Market Research**

IQVIA selected to accelerate clinical development of VYVGART™ (efgartigimod alfa fcab) by argenx SE

**Flagship Products / Coverage Areas**

- Human Data Science Cloud
- IQVIA Insights
- IQVIA Institute
- IQVIA Connected Intelligence
- Real World Data Sets
- Payers & Providers

**2021 Turnover USD (M)**

- 5,209.4

**Annual Growth (2020-2021)**

- 19.6%

**Market share (%)**

- 5.5%

**IQVIA Launches OCE+ To Deliver Enhanced AI-Driven Customer Engagement**

**Mar 2022**

**IQVIA Decentralized Trial Suite Launches Mobile Research Nursing and Phlebotomy Services Unit**

**Dec 2021**

**29,662**

2021 Total Company Employees

**4th**

Fastest Growing Companies - Top 10

**15th**

Fastest Growing Companies - Top 50

*Number of employees arrived by comparing the share of insights related turnover to total employee number.
Gartner provides fact-based consulting services to IT professionals and marketers, helping clients use and manage IT to enhance business performance.

**Top C Level People:**
- **Eugene A. Hall**
  - CEO
- **Craig Safian**
  - Executive Vice President & CFO
- **Ken Allard**
  - Executive Vice President & Chief Marketing Officer
- **Michael P. Diliberto**
  - Executive Vice President & Chief Information Officer

**Flagship Products / Coverage Areas**
- Gartner Magic Quadrant
- Gartner Hype Cycle
- Gartner Score
- Gartner IT Symposium/Xpo
- Capterra
- GetApp
- Software Advice

**2021 Turnover USD (M)**: 4,734.0
**Annual Growth (2020-2021)**: 15.5%
**Market share (%)**: 5.0%

**June 2022**
- Post its Quarterly Earnings Release in May, Gartner’s stock prices have hit 12-Month low

**Nov 2021**
- Gartner Announces A Strong Third Quarter Growth in 2021

**Aug 2021**
- Gartner Research Division Sees Double Digit Growth in 2021

**June 2022**
- Gartner Research Division Sees Double Digit Growth in 2021

**2021 Total Company Employees**: 16,600

**Fastest Growing Companies - Top 10**
- 6th

**Fastest Growing Companies - Top 50**
- 22nd
Salesforce.com is a Customer Relationship Management (CRM) company. Its salesforce.com family of products including Salesforce and Supportforce provide a suite of CRM applications to help enterprises of all sizes, industries and geographies share and manage information on-demand.

**Top C Level People:**
- Marc Benioff: Chair & Co-CEO
- Bret Taylor: Co-CEO
- Parker Harris: Co-Founder
- Amy Weaver: President & Chief Financial Officer
- Alex Dayon: President & Chief Strategy Officer

**Salesforce**
- 2021 Turnover USD (M): 3,902.0
- Annual Growth (2020-2021): 25.9%
- Market share (%): 4.1%

**Flagship Products / Coverage Areas**
- Sales Cloud
- Marketing Cloud
- Commerce Cloud
- Service Cloud
- Quip
- Salesforce Lightning
- Mulesoft

**Recent Acquisitions:**
- May 2022: Salesforce Signs Definitive Agreement to Acquire Troops.ai
- April 2022: Salesforce Completes Acquisition of Phennecs
- Oct 2021: Salesforce Completes Acquisition of Sales-Enablement Company LevelJump

**2021 Total Company Employees: 10,441**

*Number of employees arrived by comparing the share of insights related turnover to total employee number.
Adobe Systems, Inc.

Adobe is a provider of digital marketing and digital media solutions. Its tools and services allow customers to create digital content, deploy it across media and devices, measure and optimize it over time. The company helps its customers make, manage, measure, and monetize their content across every channel and screen.

Top C Level People:

Shantanu Narayen
Chairman and Chief Executive Officer

Dan Durn
Financial Officer and Executive Vice President, Finance, Technology Services and Operation

Ann Lewnes
Chief Marketing Officer and Executive Vice President, Corporate Strategy & Development

Flagship Products / Coverage Areas

- Adobe Experience Cloud
- Adobe Analytics
- Adobe Real-Time CDP
- Adobe Audience Manager
- Adobe Target
- Adobe Marketo Engage
- Adobe Campaign

For the fiscal year ended October 31, 2021:

- **2021 Turnover USD (M):** 3,867.0
- **Annual Growth (2020-2021):** 23.7%
- **Market share (%):** 4.1%

Feb 2022
LiveRamp and Adobe in Omnichannel Targeting Deal

Mar 2022
BMW Group and Adobe Expand Partnership for a Seamless Customer Journey

Oct 2021
Adobe Completes Acquisition of Frame.io
Nielsen is an audience measurement, data and analytics company that is shaping the future of media. They measure the behavior across all channels and platforms to discover what audiences love, and also offer their clients with trusted intelligence that fuels action.

Flagship Products / Coverage Areas
• One Measurement Solutions (Audience measurement)
• Impact marketing Solutions (Media Planning)
• Impact marketing Solutions (Marketing Optimization)
• Gracenote Content Solutions (Content Metadata)

May 2022
Nielsen and TikTok collaborate to unlock global marketing insights

April 2022
ESL Gaming and Nielsen expand comprehensive esports measurement business relationship

Mar 2022
Nielsen and Cox Media Group reach multi-year agreement for television and audio measurement services.
Kantar is a global insight, information and consultancy company that serves the needs of consumer brands through its media, brand, and consumer audience measurement and tracking services.

**Kantar World Panel**

**TGI Audience Activation**

**TV & Video**

**Radio & Audio**

**Digital & Social**

**eCommerce ON**

**Kantar Marketplace**

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**Top C Level People:**

- **Chris Jansen**
  - CEO
- **Michael Uzielli**
  - CFO
- **Alex Cesar**
  - Chief Technological Officer

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**Kantar**

- **2021 Turnover USD (M)**: 3,028.9
- **Annual Growth (2020-2021)**: 8.7%
- **Market share (%)**: 3.2%

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**Flagship Products / Coverage Areas**

- Kantar World Panel
- TGI Audience Activation
- TV & Video
- Radio & Audio
- Digital & Social
- eCommerce ON
- Kantar Marketplace

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**May 2022**

- Kantar acquires Qmee, setting a new standard for trust and data quality

**May 2022**

- Kantar announces agreement for sale of Kantar Public business to Trilantic Europe

**April 2021**

- Kantar to acquire Blackwood Seven, accelerating marketing ROI technology roadmap
Ipsos is a global market research company specialising in advertising, loyalty, marketing, media, and public affairs research.

**Top C Level People:**

- **Ben Page**
  Chief Executive Officer

- **Laurence Stoclet**
  Deputy CEO & Chief Financial Officer

- **Alain Couttolenc**
  Chief Development Officer

**Flagship Products / Coverage Areas**

- Ipsos UU Qualitative
- Ipsos MMA
- Ipsos.digital Platform
- Brand Health Tracking
- Mystery Shopping
- Observer
- Doctors & Patients
- Public Affairs

**Ipsos**

- 2021 Turnover USD (M): 2,539.0
- Annual Growth (2020-2021): 21.0%
- Market share (%): 2.7%

**Key Events:**

- **Mar 2022**
  Synthesio, an Ipsos company, joins the Twitter Official Partner Program

- **Mar 2022**
  Ipsos joins forces with CIESMORI to create a leading market research company in Bolivia

- **Oct 2021**
  Ipsos acquires Karian and Box, an expert in employee relationship management
IHS Markit

IHS provides information and analysis to support decision-makers in businesses and government across multiple industries.

**Top C Level People:**
- Douglas L. Peterson, President & Chief Executive Officer
- Swamy Kocherlakota, Executive Vice President, Chief Information Officer
- Ewout Steenbergen, Executive Vice President, Chief Financial Officer

**Flagship Products / Coverage Areas**
- Country Risk
- Procurement, Sourcing, and Commodity Pricing
- PIM - Purchase Managers Index
- Scenarios and Modeling
- Global Consumer Markets Service
- PIERS
- Consumer Markets & Retail Custom Solutions

**IHS Markit**
- 2021 Turnover USD (M): 2,133.1
- Annual Growth (2020-2021): 13.2%
- Market share (%): 2.3%

**Fastest Growing Companies**
- 7th Fastest Growing Companies - Top 10
- 26th Fastest Growing Companies - Top 50

**2021 Total Company Employees**: 4,524*

*Number of employees arrived by comparing the share of insights related turnover to total employee number.
CoStar is a provider of commercial real estate information, analytics and online marketplaces and conducts research through a suite of online services helping clients to analyze, interpret and gain insight on commercial property values, and market conditions.

Top C Level People:
- Scott Wheeler, CFO
- Andrew C. Florance, Founder, Director, President and CEO
- Frank Simuro, CTO

CoStar Group First Quarter 2022 Revenue Increased 13% Year-over-Year and Net New Bookings Grew 31% to a Record $68 Million

CoStar Group Acquires BureauxLocaux, a Leading Commercial Property Digital Marketplace in France

CoStar Group Acquires Business Immo, a Leading Commercial Real Estate News Service in France

Flagship Products / Coverage Areas
- STR
- Ten-X
- LoopNet
- Realla
- Apartments.com
- BizBuySell
- Lands of America

4,752**
2021 Total Company Employees

5th
Fastest Growing Companies - Top 10

20th
Fastest Growing Companies - Top 50

** Estimated number
NielsenIQ is a global measurement and data analytics company providing the most complete and trusted view of consumers and markets in 90 countries covering 90% of the world’s population. The primary focus is on consumer packaged goods manufacturers and fast-moving consumer packaged goods and retailers.

**Top C Level People:**
- Jim Peck, Chief Executive Officer
- Chandler Bigelow, Chief Financial Officer
- Mohit Kapoor, Chief Technology Officer

**Key Metrics:**
- 2021 Turnover USD (M): 1,844.0
- Annual Growth (2020-2021): N/A
- Market share (%): 1.9%

**Recent Acquisitions:**
- June 2022: NielsenIQ acquires CGA to build market-leading on-premise measurement capabilities
- Mar 2022: NielsenIQ acquires retail AI platform provider ciValue

**Flagship Products / Coverage Areas:**
- NielsenIQ Connect
- NielsenIQ BASES
- NielsenIQ Shelf Architect
- NielsenIQ Omnisales
- NielsenIQ Partner Network

**Additional Information:**
- Established Market Research
- NielsenIQ acquires retail AI platform provider ciValue
- NielsenIQ acquires Label Insight, product attribute powerhouse. Deal supercharges data intelligence in the health and wellness space.
11th
IRI

28th
Fastest Growing Companies - Top 50

Chicago, Illinois, USA
1979
Private (PE)
irworldwide.com
Established Market Research
(and Digital Data Analytics (MarTech))

Deloitte

12th
Deloitte

33rd
Fastest Growing Companies - Top 50

New York, New York, USA
1845
Private
deloitte.com
Consulting Firms
(and EFM (Enterprise Feedback Management))

IRI

2021 Turnover USD (M) 1,550.0
Annual Growth (2020-2021) 10.7%
Market share (%) 1.6%

Deloitte

2021 Turnover USD (M) 1,322.9
Annual Growth (2020-2021) 8.0%
Market share (%) 1.4%
**HubSpot, Inc.**

**2nd Fastest Growing Companies - Top 50**

- **Public**: Cambridge, Massachusetts, USA
- **2006**: Established
- **hubspot.com**: Digital Data Analytics (MarTech) (and Self-service platforms)
- **2021 Turnover USD (M)**: 1,300.7
- **Annual Growth (2020-2021)**: 47.3%
- **Market share (%)**: 1.4%

**GfK SE**

**32nd Fastest Growing Companies - Top 50**

- **Private**: Nuremberg, Germany
- **1934**: Established
- **gfk.com**: Market Research
- **2021 Turnover USD (M)**: 1,109.7
- **Annual Growth (2020-2021)**: 8.0%
- **Market share (%)**: 1.2%
Qualtrics

- 15th
- Fastest Growing Companies - Top 50
- Qualtrics
- Provo, Utah, USA
- 2002
- Public Subsidiary
- qualtrics.com
- Self-service platforms
- (and EFM (Enterprise Feedback Management))

2021 Turnover USD (M): 1,075.7
Annual Growth (2020-2021): 40.9%
Market share (%): 1.1%

McKinsey & Company

- 16th
- Fastest Growing Companies - Top 50
- McKinsey & Company
- San Francisco, California, USA
- 1926
- Private
- mckinsey.com
- Consulting Firms
- (Industry Reports and Research and Digital Data Analytics (MarTech))

2021 Turnover USD (M): 1,050.0
Annual Growth (2020-2021): -2.2%
Market share (%): 1.1%
### NICE Systems

- **2021 Turnover USD (M):** 1,001.5
- **Annual Growth (2020-2021):** 18.2%
- **Market share (%):** 1.1%

**Location:** Ra’anana, Israel

**Established:** 1986

**Website:** nice.com

**Services:** Digital Data Analytics (MarTech) (Established Market Research and EFM (Enterprise Feedback Management))

---

### Booz Allen Hamilton

- **2021 Turnover USD (M):** 999.7
- **Annual Growth (2020-2021):** 6.0%
- **Market share (%):** 1.1%

**Location:** Mclean, Virginia, USA

**Established:** 1914

**Website:** boozallen.com

**Services:** Consulting Firms (and Digital Data Analytics (MarTech))
17th
Fastest Growing Companies - Top 50

Accenture

- 2021 Turnover USD (M): 982.4
- Annual Growth (2020-2021): 19.3%
- Market share (%): 1.0%

Dublin, Ireland

- 1989

19th
Accenture

- Public Consulting Firms

accenture.com

(and Digital Data Analytics (MarTech))

12th
Fastest Growing Companies - Top 50

MailChimp

- 2021 Turnover USD (M): 970.0
- Annual Growth (2020-2021): 21.3%
- Market share (%): 1.0%

Atlanta, Georgia, USA

- Public Subsidiary

mailchimp.com

(Digital Data Analytics (MarTech) (and Self-service platforms))

20th
MailChimp

- Public

- 2001
Ernst & Young

- 21st
- 25th
- Fastest Growing Companies - Top 50
- Ernst & Young
- Turnover USD (M): 956.6
- Annual Growth (2020-2021): 13.6%
- Market share (%): 1.0%
- London, England, UK
- 1989
- Consulting Firms
- ey.com

Cision

- 22nd
- 30th
- Fastest Growing Companies - Top 50
- Cision AB
- Turnover USD (M): 772.0
- Annual Growth (2020-2021): 0.0%
- Market share (%): 0.8%
- Chicago, Illinois, USA
- 1867
- Private (PE)
- cision.com

Sample Panel Providers (and Self-service platforms)
<table>
<thead>
<tr>
<th>Company</th>
<th>Turnover USD (M)</th>
<th>Annual Growth (2020-2021)</th>
<th>Market share (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dynata</td>
<td>760.0</td>
<td>9.1%</td>
<td>0.8%</td>
</tr>
<tr>
<td>Boston Consulting Group</td>
<td>726.0</td>
<td>40.7%</td>
<td>0.8%</td>
</tr>
</tbody>
</table>
25th
KPMG

23rd
Fastest Growing Companies - Top 50

KPMG

Toronto, Ontario, Canada
1987

home.kpmg
Consulting Firms

(MarTech) (Established Market Research and EFM (Enterprise Feedback Management))

KPMG

2021 Turnover USD (M) 674.7
Annual Growth (2020-2021) 15.5%
Market share (%) 0.7%

Private
<table>
<thead>
<tr>
<th>Company Name</th>
<th>2021 Turnover USD (M)</th>
<th>Annual Growth 2020-2021</th>
<th>Fastest Growing Companies - Top 50</th>
<th>Main Segments Active in</th>
</tr>
</thead>
<tbody>
<tr>
<td>Verisk Analytics</td>
<td>648.9</td>
<td>16.3%</td>
<td>21</td>
<td>Industry Reports and Research (and Consulting Firms)</td>
</tr>
<tr>
<td>PwC</td>
<td>612.7</td>
<td>-4.8%</td>
<td>48</td>
<td>Consulting Firms (and Digital Data Analytics (MarTech))</td>
</tr>
<tr>
<td>Oracle Corporation</td>
<td>604.2</td>
<td>3.3%</td>
<td>39</td>
<td>Digital Data Analytics (MarTech) (and EFM (Enterprise Feedback Management))</td>
</tr>
<tr>
<td>Medallia</td>
<td>570.0</td>
<td>19.4%</td>
<td>16</td>
<td>EFM (Enterprise Feedback Management) (Social Listening and Communities and Established Market Research)</td>
</tr>
<tr>
<td>IDC (owned by IDG)</td>
<td>563.9</td>
<td>5.4%</td>
<td>37</td>
<td>Industry Reports and Research (and Digital Data Analytics (MarTech))</td>
</tr>
<tr>
<td>Sitecore</td>
<td>557.0</td>
<td>30.0%</td>
<td>7</td>
<td>Digital Data Analytics (MarTech) (and Self-service platforms)</td>
</tr>
<tr>
<td>Lightspeed</td>
<td>542.0</td>
<td>227.4%</td>
<td>1</td>
<td>Digital Data Analytics (MarTech)</td>
</tr>
<tr>
<td>Bain &amp; Company</td>
<td>533.6</td>
<td>30.1%</td>
<td>6</td>
<td>Consulting Firms (Industry Reports and Research and Established Market Research)</td>
</tr>
<tr>
<td>Gerson Lehrman Group (GLG)</td>
<td>530.5</td>
<td>3.0%</td>
<td>41</td>
<td>Social Listening and Communities (and Consulting Firms)</td>
</tr>
<tr>
<td>LiveRamp</td>
<td>525.0</td>
<td>18.5%</td>
<td>18</td>
<td>Digital Data Analytics (MarTech) (Self-service platforms and Established Market Research)</td>
</tr>
<tr>
<td>INTAGE</td>
<td>524.2</td>
<td>-0.5%</td>
<td>46</td>
<td>Established Market Research</td>
</tr>
<tr>
<td>Forrester Research, Inc.</td>
<td>494.3</td>
<td>10.1%</td>
<td>29</td>
<td>Industry Reports and Research (Consulting Firms and Established Market Research)</td>
</tr>
<tr>
<td>Sprinklr</td>
<td>492.4</td>
<td>27.3%</td>
<td>8</td>
<td>Social Listening and Communities (and EFM (Enterprise Feedback Management))</td>
</tr>
<tr>
<td>Company Name</td>
<td>2021 Turnover USD (M)</td>
<td>Annual Growth 2020-2021</td>
<td>Fastest Growing Companies - Top 50</td>
<td>Main Segments Active in</td>
</tr>
<tr>
<td>----------------------------------</td>
<td>----------------------</td>
<td>-------------------------</td>
<td>------------------------------------</td>
<td>-----------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>The NPD Group, Inc.</td>
<td>477.9</td>
<td>6.5%</td>
<td>34</td>
<td>Industry Reports and Research (and Established Market Research)</td>
</tr>
<tr>
<td>J.D. Power</td>
<td>464.3</td>
<td>6.0%</td>
<td>35</td>
<td>Industry Reports and Research (and Digital Data Analytics (MarTech))</td>
</tr>
<tr>
<td>Zeta Global Corp.</td>
<td>458.3</td>
<td>24.5%</td>
<td>10</td>
<td>Digital Data Analytics (MarTech) (and Self-service platforms)</td>
</tr>
<tr>
<td>Momentive</td>
<td>450.7</td>
<td>20.0%</td>
<td>14</td>
<td>Self-service platforms (Sample Panel Providers and EFM (Enterprise Feedback Management))</td>
</tr>
<tr>
<td>dunnhumby Ltd.</td>
<td>445.3</td>
<td>2.4%</td>
<td>42</td>
<td>Established Market Research</td>
</tr>
<tr>
<td>Meltwater Group</td>
<td>403.0</td>
<td>11.5%</td>
<td>27</td>
<td>Social Listening and Communities</td>
</tr>
<tr>
<td>Macromill Group</td>
<td>393.2</td>
<td>1.7%</td>
<td>43</td>
<td>Established Market Research</td>
</tr>
<tr>
<td>American Institutes for Research</td>
<td>374.0</td>
<td>33.2%</td>
<td>5</td>
<td>Established Market Research (and Digital Data Analytics (MarTech))</td>
</tr>
<tr>
<td>RAND Corporation</td>
<td>372.5</td>
<td>1.2%</td>
<td>44</td>
<td>Industry Reports and Research (and Established Market Research)</td>
</tr>
<tr>
<td>Comscore</td>
<td>367.0</td>
<td>3.1%</td>
<td>40</td>
<td>Established Market Research (Social Listening and Communities and Digital Data Analytics (MarTech))</td>
</tr>
<tr>
<td>Ascential</td>
<td>362.1</td>
<td>14.9%</td>
<td>24</td>
<td>Industry Reports and Research (and Established Market Research)</td>
</tr>
<tr>
<td>Verint</td>
<td>349.8</td>
<td>5.3%</td>
<td>38</td>
<td>EFM (Enterprise Feedback Management) (Digital Data Analytics (MarTech) and Social Listening and Communities)</td>
</tr>
</tbody>
</table>
4. Largest companies per country

This data shows the largest players, in alphabetical order, for each country.

Argentina
Breavis
IMR
MPG

Bangladesh
Kantar
Luminaries Research
Nielsen

Belgium
GfK
Ipsos
Kantar

Bolivia
Captura Consulting
Ipsos CIESMORI
Kantar

Bulgaria
GfK
Ipsos
Nielsen

Chile
GfK
Ipsos
Kantar

China
CTR
Ipsos China
Nielsen China

Colombia
Kantar Ibope Media
Kantar Millward Brown
NielsenIQ

Croatia
ACNielsen
AGB Nielsen
Ipsos

Czech Republic
Ipsos
Kantar
NielsenIQ

Democratic Republic of Congo
Ipsos
Kantar
Target

Finland
Finnpanel Oy
Kantar TNS
Taloustutkimus Oy

France
BVA
Ipsos
Kantar

Germany
GfK
Ipsos
Kantar

Iran
EMRC
IRC
Rahbar Bazaar

Iraq
IIACSS
Thinkbank

Ireland
Kantar
Nielsen
Red C

Israel
Geocartography
Ipsos
Kantar

Italy
GfK
IQVIA
Nielsen

Japan
INTAGE
Macromill
Video Research

1 Information related to the largest companies in 2020; data for 2021 will come at a later date and will be published in due time. Not all countries disclosed this information.
<table>
<thead>
<tr>
<th>Country</th>
<th>Research Companies</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lebanon</td>
<td>Infor Pro, Ipsos, Statistics Lebanon</td>
</tr>
<tr>
<td>Kazakhstan</td>
<td>AC Nielsen Kazakhstan, Ipsos, TNS Central Asia - KANTAR</td>
</tr>
<tr>
<td>Malaysia</td>
<td>Ipsos, Kantar, Nielsen</td>
</tr>
<tr>
<td>Mexico</td>
<td>De la Riva Group, Ipsos, UPAX</td>
</tr>
<tr>
<td>Mongolia</td>
<td>IRIM, MMCG, VMLY&amp;R</td>
</tr>
<tr>
<td>Netherlands</td>
<td>GfK Netherlands, Ipsos, Kantar Netherlands</td>
</tr>
<tr>
<td>New Zealand</td>
<td>Ipsos, Kantar Group, including Colmar, Brunton, Kantar/TNS and Needscope, Nielsen</td>
</tr>
<tr>
<td>Nigeria</td>
<td>Ipsos, Kantar, Nielsen</td>
</tr>
<tr>
<td>Norway</td>
<td>Kantar, Norstat, Opinion</td>
</tr>
<tr>
<td>Pakistan</td>
<td>Ipsos, Kantar, Nielsen</td>
</tr>
<tr>
<td>Peru</td>
<td>Ipsos, Kantar, Ibope Media, Nielsen</td>
</tr>
<tr>
<td>Philippines</td>
<td>Kantar, Nielsen, PSRC</td>
</tr>
<tr>
<td>Poland</td>
<td>GfK, Kantar, NielsenIQ</td>
</tr>
<tr>
<td>Portugal</td>
<td>HmR, IQVIA, Nielsen</td>
</tr>
<tr>
<td>Romania</td>
<td>GfK, Ipsos Interactive Services, NielsenIQ</td>
</tr>
<tr>
<td>Russia</td>
<td>HRC, Kantar, Nielsen</td>
</tr>
<tr>
<td>Spain</td>
<td>GfK, Ipsos, Kantar</td>
</tr>
<tr>
<td>Sri Lanka</td>
<td>Kantar, Nielsen, Peppercube</td>
</tr>
<tr>
<td>Taiwan</td>
<td>Ipsos, Kantar, Nielsen</td>
</tr>
<tr>
<td>Ukraine</td>
<td>GfK, MDM &amp; Proxima Research, NielsenIQ</td>
</tr>
<tr>
<td>United Kingdom</td>
<td>Dunnhumby, Gartner, Kantar</td>
</tr>
<tr>
<td>Uruguay</td>
<td>Ibope/Kantar, Nielsen</td>
</tr>
<tr>
<td>USA</td>
<td>Gartner, IQVIA, Nielsen</td>
</tr>
<tr>
<td>Vietnam</td>
<td>Ipsos, Kantar, Nielsen</td>
</tr>
<tr>
<td>Zimbabwe</td>
<td>Research International Buereu, Select Research, Top Line Research</td>
</tr>
</tbody>
</table>
5. Methodology, glossary, and acknowledgements

5.1 Methodology

Data for this exercise was provided by Outsell, an analytics company and a long-time ESOMAR provider, through a joint partnership with the Insights Association and Michigan State University. This data supplements the information provided by over a hundred of the world’s countries and serves to identify the amount of “unreported” turnover of the industry that may otherwise remain hidden at regional and global levels. This data, furthermore, is categorised by each of the three branches of the industry and can be currently classified into established research, technology-enabled methods, and reporting activity. Please refer to the glossary for a definition of these terms.

Outsell bases the information in this report on a comprehensive and rigorous methodology developed by them. This methodology provides financial estimates for the overall market and specific companies in the ecosystem. Outsell methodology starts with its growing database of over 10,000 global data and information companies, which are assigned to all appropriate segments in which they operate.

Outsell uses all publicly available information and its own insight and research with the companies themselves to size each player in the space. They size public companies based primarily on their reported results, while they also apply analysis to segment and align their revenues according to Outsell’s industry segmentation. They size private companies using the best available information on each company, augmented by their own primary research.

Outsell does not include pass-through revenue where reported in the financial statements of public companies. Pass-through revenue is often the work that comes from either another internal division or an external supplier or partner and is transferred “at cost” to the client, meaning there is no mark-up or margin made off the work. Outsell finds pass-through revenue called out frequently by agency holding companies who also have research companies in their portfolio and by ad-tech companies who pass revenue through their operations from media buying efforts done by agencies on behalf of their clients.

Some companies may have revised turnovers for 2020 in light of improved information. In these cases, the most recent data is used to recalculate the 2020 ranking and compare it to 2021. While on the surface, this may create a conflict when looking at the 2020 ranking in the 2021 edition of the Global Market Research report, in reality, it is a fairer approach as it rids the ranking of unrealistic and undesirable effects (jumps in ranking, excessive growth, etc.).

Data for the largest companies per country is provided by national market research associations, leading companies, independent analysts and ESOMAR representatives from around the world.

Additional data for the Top-10 largest firms was compiled on a best effort basis, and when data was unavailable or scarce, appropriate notes were added to the text.
Primary research: 'new' or 'original' research that collects data from source in order to answer a question or gain more understanding of a specific issue.

Secondary research: compilation and analysis of previously collected or published information, which can be used to answer a question or gain more understanding of a specific issue.

Data gathering / processing: the process of gathering and measuring information on targeted variables in an established system, which then enables one to answer relevant questions and evaluate outcomes. Data collection is a component of research in all fields of study including physical and social sciences, humanities, and business. While methods vary by discipline, the emphasis on ensuring accurate and honest collection remains the same. The goal for all data collection is to capture quality evidence that allows analysis to lead to the formulation of convincing and credible answers to the questions that have been posed.

Active methods of research: ways to gather data which require a 'real-time', one-to-one personal interaction between researcher and respondent.

Passive methods of research: a less intrusive, less conscious recording of behaviour and generation of information, for the researcher to use to generate insights.

Established research: Long used methodologies, with a proven track record and thoroughly refined over time. This type of research includes mail, telephone CATI (including CATI to mobiles, i.e. a person-to-person interview, and IVR interviews), face-to-face (PAPI / CAPI / mobile assisted), online quantitative research (including CASI – “self-interviewing” – and online panel), mobile / smartphone quantitative research, audience measurement, F2F Group discussions / focus groups, in-depth face to face interviews, ethnography.

Technology-enabled research: Includes methods that could not have existed without the advent of technology, such as online traffic / web analytics (includes content tracking, digital tracking, CRM analytics and all advanced analytics), automated digital / electronic (includes retail audits, consumer household panels, location-based services, passive metering and log file processing), social media monitoring, online research communities (includes social media, in-depth interviews and online ethnography) and social media listening.

Reporting: Step that usually follows data gathering, where it is firstly checked, then analysed (the reason why secondary analysis also falls within this step in the process), and is then presented to the client. Presentation forms can comprise presentations, workshops, dedicated reports, counselling on business processes, advisory services, etc. Areas of reporting include consulting firm research, advisory services, marketing reports/research, and all other secondary analysis (often by companies whose main business is not primary data collection, but which do offer insights, such as Gartner, Forrester, Mintel, Euromonitor, Deloitte, McKinsey & Co., PwC, etc.).

Quantitative research methods: Objective measurements and the statistical, mathematical, or numerical analysis of data collected through polls, questionnaires, and surveys, or by manipulating pre-existing statistical data using computational techniques. Quantitative research focuses on gathering numerical data and generalizing it across groups of people or to explain a particular phenomenon. It includes methods such as face-to-face, telephone (CATI), online/-mobile quantitative research, online panel, audience measurement, social media an communities, online/web analytics, retail audits, consumer household panels, location-based services, passive metering or log-file processing.

Qualitative research methods: research with stress on the socially constructed nature of reality, the intimate relationship between the researcher and what is studied, and the situational constraints that shape inquiry. Such researchers emphasize the value-laden nature of inquiry. They seek answers to questions that stress how social experience is created and given meaning. It includes methods such as focus groups, in-depth face-to-face interviews, online/mobile qualitative research, traditional ethnography, or online research communities.
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  David Perry - SYNTÉC Etude (A)
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  Diana Vigliani - Assirm - Italian Association of market research, social and opinion institutes (A)
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  Souvena Ragugley - RAIZ - Research Association New Zealand
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  Seun Oyela - NMRD - New Zealand Research Association (A)
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Nigeria
  ALI Sibut (R) - Nordnet Hage AS

Pakistan
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Peru
  Uri To (R) - Disaster International

Philippines
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  Jen Vidal - MOBES - Marketing and Opinion Research Society of the Philippines
  Axel Esteban (R) - PSIC

Portugal
  Portugal

Poland
  Piotr Kuchnowski - OBR - Polish Society of Market and Opinion Researchers (A)
  Ludwia Rad (R) - Research and Partners

Romania
  Alina Serbanica (R) - Ipsos
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  Alexander Whalley (R) - National Theatre
  David Cahn - Synrgis
  Cripin Beale (R) - mTab
  Lucy Davies (R) - Kemn as Mustard

Uruguay
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Vietnam
  Richard Bum (R) - Cemigo

Zimbabwe
  Major Tikwa - Multimedia

Sri Lanka
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Taiwan
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