ESOMAR
Global Top Insights Companies

Presenting the leaders of the industry

2025

ESOMAR

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1. Industry overview

The insights industry during 2024 was characterised by continuous growth, a stable landscape, and restrained investment. The relatively high interest rates observed in the aftermath of the COVID-19 pandemic led to conservative positions in the industry as investment companies accumulated so-called dry powder for longer than usual. Observers have commented that the current year may be when investment finally resumes, presumably in technology-rich companies.

The fundamental diversity in business approaches in the industry gave rise to separate rankings of top companies to show players related to similar or analogous areas. As such, this publication will present the 20 largest companies in:

- the market research sector, composed of full-service research firms and those sample panel providers that are an integral part of their activity;
- the research software sector, composed of subscription software firms dedicated to DaaS, SaaS, CRMs, and the like, such as digital data providers, social listening and communities companies, self-serve research providers, or enterprise feedback management firms;
- the reporting sector, characterised by consultancy, business services, and industry reports;
- and, naturally, we will delve into the behaviour of the insights industry as a whole, with a look at the Global Top 50 Insights Companies for the year 2024.

ESOMAR's Global Top-20 Market Research Companies 2025

ESOMAR's Global Top-20 Research Software Companies 2025

ESOMAR's Global Top-20 Reporting Companies 2025

ESOMAR's Global Top-50 Insights Companies 2025

1.1. Global insights turnover

An official figure for global insights turnover for 2024 will be published in ESOMAR's Global Market Research 2025 report, which is expected in September. In the meantime, preliminary calculations for the market share of the Global Top 50 Insights Companies are calculated as follows: expected turnover for 2024 as published in ESOMAR's *Global Market Research 2024* for the market research sector as well as data from the upcoming *Forecasting the Data and Insights Industry: A 2027 Outlook* (formerly Evolution of the Data, Analytics and Insights) for the remaining sectors.

The resulting expected turnover for 2024 is US$147.5 billion:
- The global market research sector had a turnover of US$50.30 billion, representing 34% of the global turnover.
- The research software sector had a turnover of US$62.16 billion, with a global share of 42%.
- A reporting sector, composed of consultancy and business services firms, had a global value of US$35.05 billion and a global share of 24%.

Please note that this is to be validated by the September 2025 edition of ESOMAR's Global Market Research report.

This information enables us to estimate the share of ESOMAR's Global Top 50 Insights Companies to sit at 52.8% (US$77.3bn). This marks a significant recovery for these companies compared to their peak in 2021, when the expected share of the Global Top 50 exceeded 53%.

Preliminary turnover of the Insights Industry 2024, US$ bn (%)

50.30 (34%)	62.16 (42%)	35.05 (24%)
Market Research	Research Software	Reporting
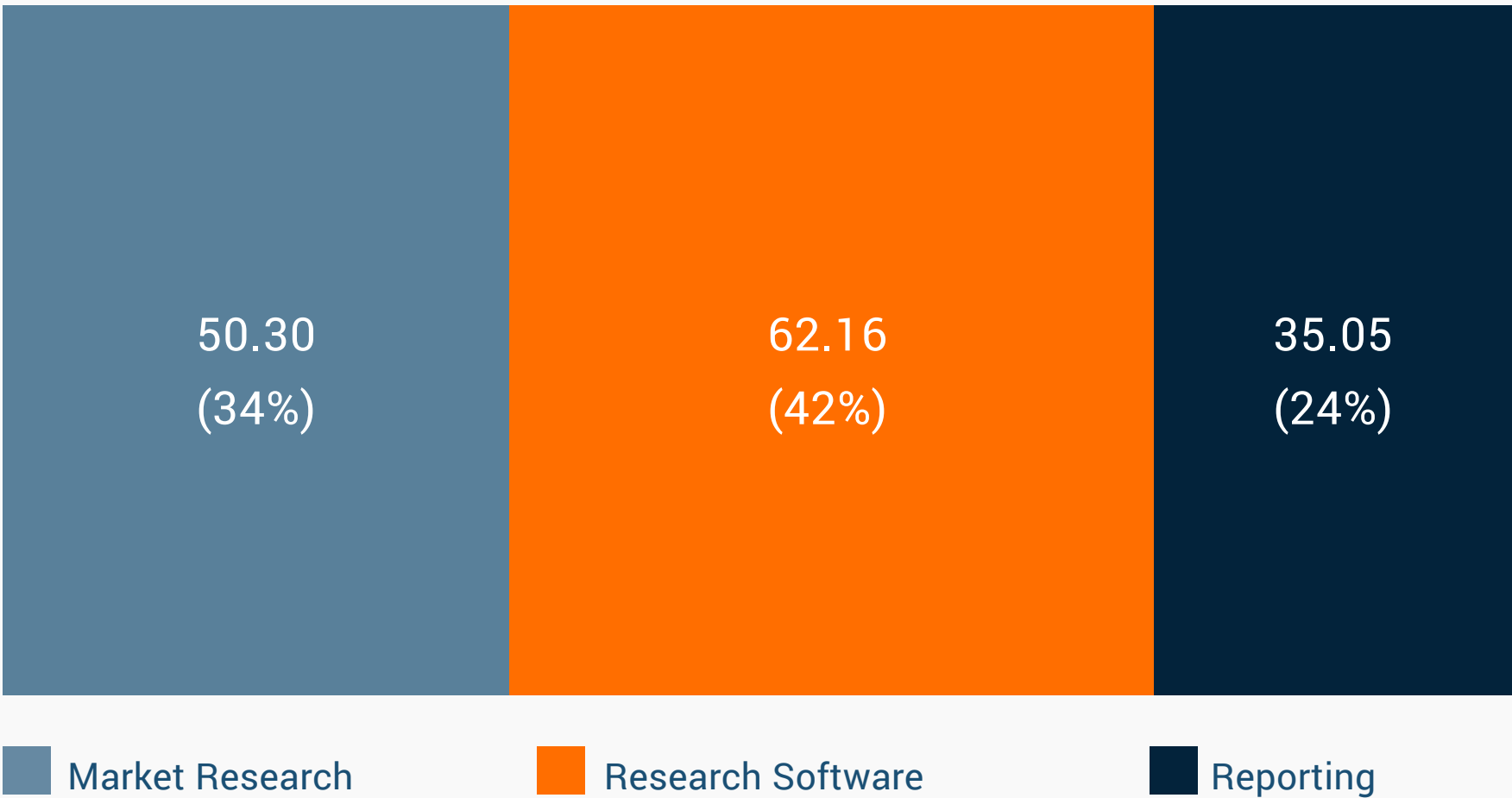
Sources: Forecasting the Data and Insights Industry: A 2027 Outlook
Global Market Research 2024 (please see the Methodology section)

1.2. The engine of growth

For several years now, industry growth has favoured platforms and software companies and subscription-based services. As such, global growth of the research software sector has outpaced that of the market research one and continued to do so in 2024.

Despite an atmosphere of macroeconomic uncertainty, which has continued thus far in 2025, each of the sectors managed to sustain their 2024 levels of growth. This shows the importance of the insights industry, despite having cooled down after the phenomenal growth seen by digital research methods during the COVID-19 pandemic. This was particularly true for the research software sector, which served as a haven for digital investment during the pandemic.

The weakest link within the market research sector was the sample panel providers—a sector hurt by concerns over panel quality, respondent fraud, and the rise of certain advancements in artificial intelligence. Full-service firms appear to be the segment that pulls the overall market research sector above global inflation (expected at around 3%), bringing the sector's growth to 4.9%. The fastest-growing segments in 2024, however, were digital data analytics at 13.6% and the overall consulting and business services sector at 7.5%.

A closer look at each of the three industry sectors can be found in ESOMAR's _Forecasting the Data and Insights Industry_, which offers an overview of projected turnover into 2027.

Industry growth per sector (%)

- Market Research
- Research Platform
- Reporting
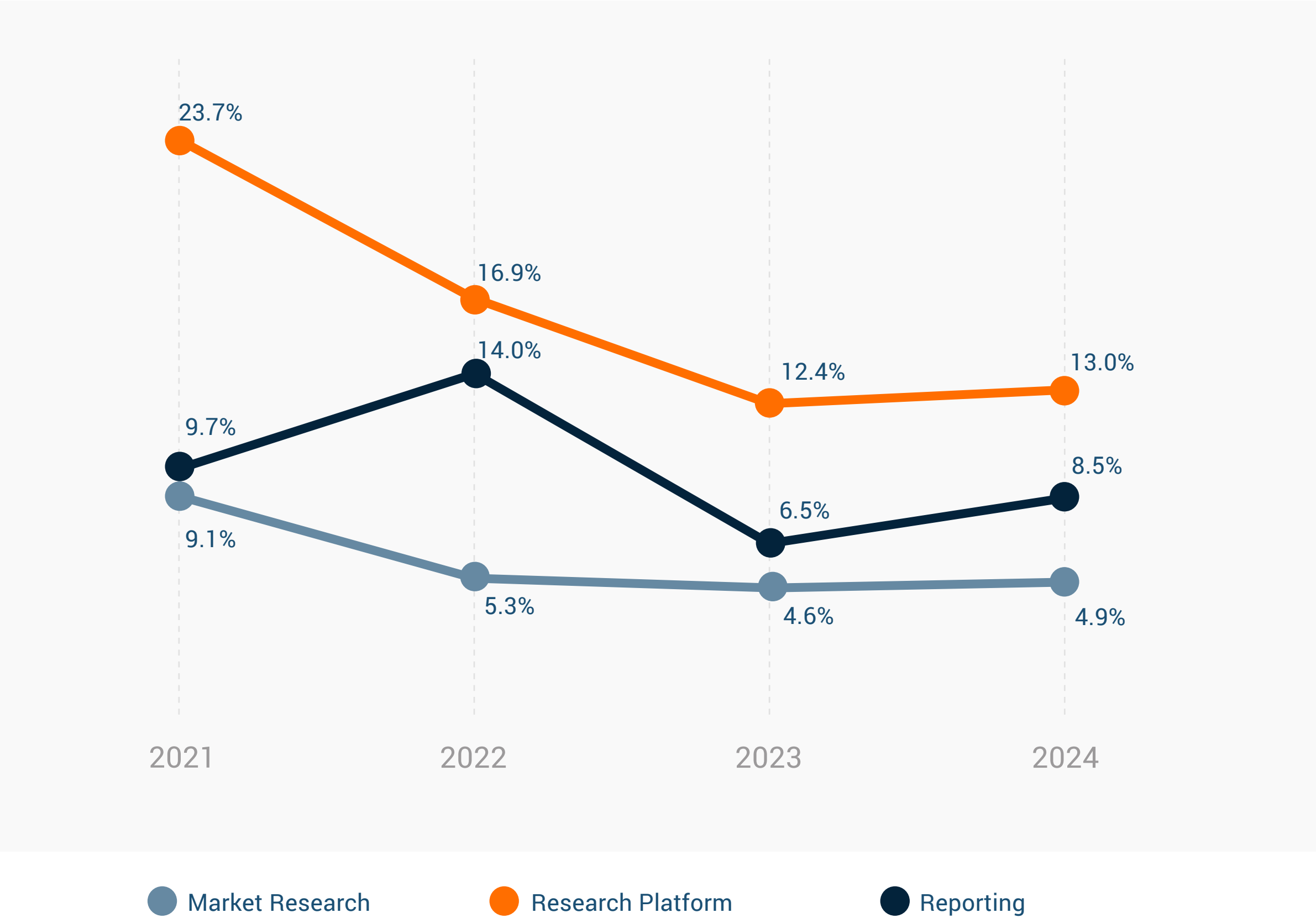
Sources: Forecasting the Data and Insights Industry: A 2027 Outlook
(values for the market research sector extrapolated from the Global Market Research)

1.3. Consolidation of players

In what is probably the year of lowest consolidation in the industry, only six out of the top 50 largest companies globally were involved in any meaningful level of mergers and acquisitions. As the world continued to grapple with relatively high inflation and the subsequently high interest rates, overall investment in the industry slowed down, hoping for better, more stable times before transferring any assets.

The consequence is the accumulation of capital throughout 2024, locked in investments for longer than usual, awaiting better circumstances. Indeed, 2025 started with an increase in the movement of investments across the industry, signalling that circumstances had improved compared to a year earlier.

Nevertheless, few companies within the overall top 50 engaged in significant investments, mergers, and/or acquisitions, representing 10.8% of the total turnover generated by the top 50 companies. This level of industrial consolidation is around half of that observed in 2023 (which, itself, was around half of the level observed in 2022).

2025 is expected to resume industrial consolidation as the industry continues to diversify its portfolio as well as divest other business divisions as considered strategically appropriate.

M&A in the Insights Industry, 2024

44 — M&A Unrelated
6 — M&A Related
Top-50 companies (number)

$68.90 — M&A Unrelated
$8.37 — M&A Related
Top-50 companies (US$ billion)
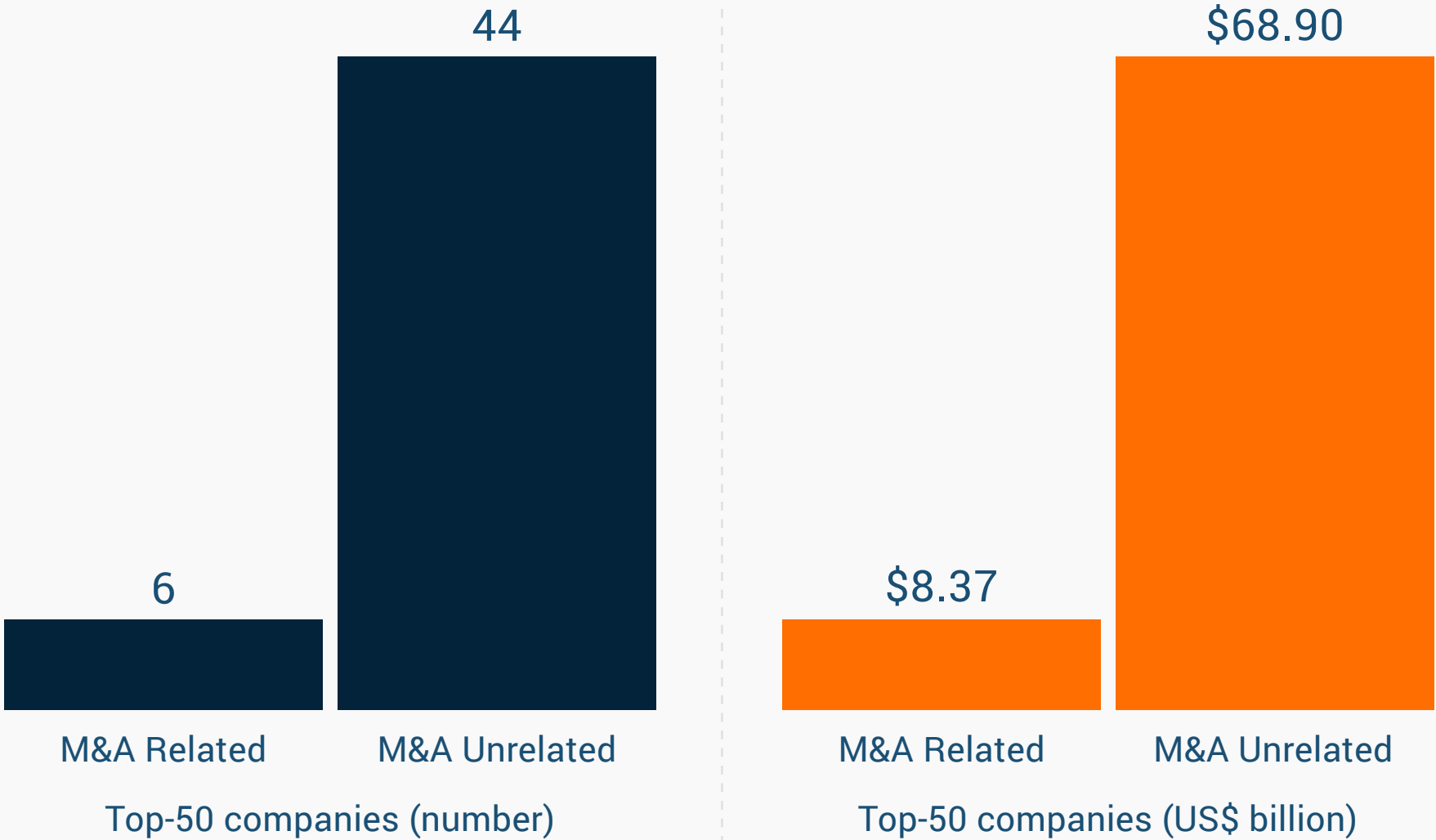
Source: Forecasting the Data and Insights Industry: A 2027 Outlook

2. Sectorial rankings

While ESOMAR categorises the insights industry as a unified entity, the truth is that the companies that constitute it engage in vastly different business practices. To aid in the comparison of such disparate ecosystems, ESOMAR created a series of Global Top 20 rankings for each of the sectors in the industry—market research, research software, and consultancy and business services—to be read in conjunction with the complete Global Top-50 of Insights Companies.

The global top 20 companies in the second-largest (though undoubtedly most representative) sector of the insights industry—market research—show continued linear growth over 2024 of 10.3%, surpassing that of their own segment (4.9%). The largest three companies gained two percentage points in market share within the sector, growing to 48%, aided by the merger of NIQ and GfK.

The global top 20 research software companies, at 11.1%, grew in parallel with their overall sector, particularly thanks to companies such as Klaviyo, Sprout Social, HubSpot, Lightspeed, Intuit, and LiveRamp, which surpass their sectoral growth.

Lastly, the global top 20 consultancy and business services companies matched the growth of their sector at 8.5%; this includes fast-growing companies like Wood Mackenzie, McKinsey & Co., Bain & Co., Booz Allen Hamilton, and CoStar Group.

Market research

IQVIA, with a partial turnover of US$5,828 million and a growth rate of 3.8%
NIQ, with a total turnover of US$ 3,973 million and a growth rate of 18.9%
Nielsen, with a total turnover of US$3,400 million and a growth rate of -2.9%

Research software

Adobe, with a partial turnover of US$5,366 million and a growth rate of 9.7%
Salesforce, with a partial turnover of US$5,281 million and a growth rate of 7.5%
HubSpot, with a total turnover of US$2,628 million and a growth rate of 21.1%

Reporting

Gartner, with a total turnover of US$6,267 million and a growth rate of 6.1%
CoStart Group, with a total turnover of US$2,736 million and a growth rate of 11.5%
S&P Global, with a partial turnover of US$2,226 million and a growth rate of 8.9%

2.1. ESOMAR's Global Top-20 Market Research Companies

With a combined turnover of US$27.3 billion and a linear growth rate of 10.33%, the Global Top 20 Market Research Companies show mixed results from different companies, with relatively flat growth for the largest companies and some surprising positive growth for some companies with government contracts like Westat.

All in all, growth for the top 20 market research companies surpasses that of their sector (4.9%), and even manage to surpass the overall expected growth of the industry (8.9%). Together, the Top 20 represented an estimated 54.3% of the global share within the sector in 2024.

Up to 6 companies, representing 28% of the total Top 20 turnover, reported negative growth (more than last year). These include Nielsen, Kantar, ABT Associates, ComScore, AIR, and CINT.

Conversely, the remaining 62% of turnover is composed of companies with positive growth, four of which presented double-digit growth. These four fast-growing companies, with a combined share of 19% among this reduced ranking, are NIQ, Westat, Prodege and Escalent.

Compared to 2023, the top 10 shifts a place with the merger of NIQ and GfK, and GLG overtakes Dynata and takes seventh place. The position left open by the merger is taken by INTAGE, which takes tenth place.

Global Top-20 Market Research Companies

IQVIA

1st	5,828	3.77%	11.59%
	2024 Turnover USD (M) *(Partial)	Growth (2023-2024)	Sectorial Market Share

NIQ — 2nd

2024 Turnover USD (M) *(Total)	3,973
Growth (2023-2024)	18.9%
Sectorial Market Share	7.90%

Nielsen — 3rd

2024 Turnover USD (M) *(Total)	3,400
Growth (2023-2024)	-2.86%
Sectorial Market Share	6.76%

Total = Total company turnover; Partial = Only insights-related turnover

Global Top-20 Market Research Companies

Rank	Company	2024 Turnover (US$ M)*	Growth 2023/24	Sectorial Market Share	Fastest growing in the sector	Rank in Top 50	Main Segments Active in
1	IQVIA	5,828 (Partial)	3.77%	11.59%	11th	2nd	Established Market Research, Digital Data Analytics
2	NIQ	3,973 (Total)	18.90%	7.90%	2nd	5th	Established Market Research, Digital Data Analytics
3	Nielsen	3,400 (Total)	-2.86%	6.76%	18th	6th	Established Market Research, Social Listening and Communities, and Digital Data Analytics
4	Kantar^	2,913 (Total)	-2.23%	5.79%	17th	7th	Established Market Research, Sample Panel Providers, and Self-serve Research Platforms
5	Ipsos^	2,640 (Total)	1.30%	5.25%	12th	9th	Established Market Research, Digital Data Analytics, and Sample Panel Providers
6	Circana (IRI+NPD)	2,550 (Total)	8.79%	5.07%	9th	11th	Established Market Research, Sample Panel Providers
7	Gerson Lehrman Group (GLG)	725 (Total)	9.02%	1.44%	8th	33rd	Established Market Research, Self-serve Research Platforms, and Established Market Research
8	Dynata	685 (Total)	1.03%	1.36%	13th	36th	Sample Panel Providers, Social Listening and Communities, and Established Market Research
9	Alphasights	536 (Total)	9.97%	1.07%	5th	39th	Established Market Research, Digital Data Analytics
10	INTAGE	485 (Total)	9.67%	0.96%	6th	40th	Established Market Research
11	Westat	467 (Total)	62.37%	0.93%	1st	42nd	Established Market Research
12	dunnhumby	433 (Total)	6.99%	0.86%	10th	46th	Established Market Research
13	YouGov^	417 (Total)	0.60%	0.83%	14th	48th	Established Market Research
14	Prodege^	380 (Total)	10.14%	0.76%	4th	50th	Sample Panel Providers
15	Abt Associates	363 (Total)	-16.29%	0.72%	20th	-	Established Market Research
16	Comscore	356 (Total)	-3.86%	0.71%	19th	-	Established Market Research, Digital Data Analytics, and Social Listening and Communities
17	American Institutes for Research (AIR)	348 (Total)	-2.06%	0.69%	16th	-	Established Market Research
18	Macromill Group	342 (Total)	9.43%	0.68%	7th	-	Established Market Research
19	Escalent	270 (Total)	14.89%	0.54%	3rd	-	Established Market Research
20	CINT AB	180 (Total)	-0.77%	0.36%	15th	-	Sample Panel Providers

2.2. ESOMAR's Global Top-20 Research Software Companies

The Global Top 20 Research Software Companies represent a share of 44% of the total sector, in line with a year earlier. This is a sign that the long tail of smaller players in this sector remains strong and able to maintain the growth rate of the larger players. It is also a sign of the general lack of consolidation in the industry throughout the year, as explained in Chapter 1.3.

In this sector, only three companies reported negative growth, two of which hover around flat growth at approximately 0%. Only new entrant Contensquare, at -5%, presents solid negative growth.

The positive growth of the research software sector, expected at around 13%, shows the quick development of companies. Up to seven companies within the top 20 surpassed this growth rate. These include Zeta Global (38%), Klaviyo (34%), Sprout Social (31%), Hubspot (21%), Intuit and Lightspeed (20%), and LiveRamp (13%).

Overall, however, the top 20 research software companies present a growth rate comparable with the overall sector (11%), which shows the dynamism of this industry regardless of company size.

It is important to note that most companies in this sector engage in activities unrelated to the generation of insights. In these cases, this ranking will only consider the turnover that results from insights generation, disregarding the rest of the services provided.

Global Top-20 Research Software Companies

Adobe

1st

5,366	9.67%	8.63%
2024 Turnover USD (M) *(Partial)	Growth (2023-2024)	Sectorial Market Share

2nd — salesforce

2024 Turnover USD (M) *(Partial)	5,281
Growth (2023-2024)	7.51%
Sectorial Market Share	8.50%

3rd — HubSpot

2024 Turnover USD (M) *(Total)	2,628
Growth (2023-2024)	21.07%
Sectorial Market Share	4.23%

*Total = Total company turnover; Partial = Only insights-related turnover

Top 20

Global Top-20 Research Software Companies

Rank	Company	2024 Turnover (US$ M)*	Growth 2023/24	Sectorial Market Share	Fastest growing in the sector	Rank in Top 50	Main Segments Active in
1	Adobe	5,366 (Partial)	9.67%	8.63%	8th	3rd	Digital Data Analytics, Enterprise Feedback Management
2	Salesforce	5,281 (Partial)	7.51%	8.50%	12th	4th	Digital Data Analytics, Enterprise Feedback Management, and Social Listening and Communities
3	HubSpot	2,628 (Total)	21.07%	4.23%	4th	10th	Digital Data Analytics, Enterprise Feedback Management, and Self-serve Research Platforms
4	Qualtrics^	1,860 (Total)	9.41%	2.99%	9th	13th	Self-serve Research Platforms
5	Intuit (Mailchimp)	1,223 (Partial)	19.75%	1.97%	6th	18th	Digital Data Analytics, Established Market Research
6	NICE	1,187 (Partial)	8.49%	1.91%	11th	19th	Digital Data Analytics
7	Lightspeed	1,091 (Total)	19.99%	1.76%	5th	20th	Digital Data Analytics, Digital Data Analytics
8	Zeta Global	1,006 (Total)	38.02%	1.62%	1st	22nd	Digital Data Analytics, Consulting Firms
9	Klaviyo	937 (Partial)	34.29%	1.51%	2nd	23rd	Digital Data Analytics
10	Cision AB	911 (Total)	-0.11%	1.47%	18th	24th	Social Listening & Communities
11	Sprinklr	796 (Total)	8.74%	1.28%	10th	30th	Social Listening & Communities
12	Oracle Corporation	768 (Partial)	3.85%	1.24%	13th	31st	Digital Data Analytics, Enterprise Feedback Management
13	LiveRamp	746 (Total)	13.02%	1.20%	7th	32nd	Digital Data Analytics, Industry Reports & Research, and Established Market Research
14	Medallia	710 (Total)	1.43%	1.14%	15th	34th	Enterprise Feedback Management, Self-serve Research Platforms
15	Sitecore	690 (Total)	0.29%	1.11%	17th	35th	Digital Data Analytics, Digital Data Analytics
16	SurveyMonkey	481 (Total)	1.24%	0.77%	16th	41st	Self-serve Research Platforms
17	Meltwater Group	460 (Total)	2.79%	0.74%	14th	43rd	Social Listening & Communities, Digital Data Analytics
18	Verint Systems	455 (Partial)	-0.13%	0.73%	19th	44th	Enterprise Feedback Management
19	Sprout Social	406 (Total)	30.94%	0.65%	3rd	49th	Social Listening & Communities
20	Contentsquare	380 (Partial)	-5.00%	0.61%	20th	-	Digital Data Analytics

2.3. ESOMAR's Global Top-20 Reporting Companies

While reporting (consultancy and business services) is the smallest of the sectors, it continues to include the largest company in the industry, Gartner, which enjoys a turnover of US$6.3 bn. Given the results of the latest edition of *ESOMAR's Global Users & Buyers of Insights 2025*, these groups continue to seek strategic guidance, consultancy, and advisory for the implementation of insights in their organisations. As such, this sector has leveraged this gap in the service, positioning itself as a key provider.

Only one company, Forrester, declared negative growth at -10%, reminiscent of a year earlier when, again, it appeared as the only firm with a negative result.

Several companies presented double-digit growth, including Wood Mackenzie, McKinsey & Co., Bain & Co., Booz Allen Hamilton, and CoStar Group. Four more present faster-than-sectorial growth: RAND Corporation, BCG, S&P Global, and Oliver Wyman (>8.5%).

As with the growth of the research software sector, ESOMAR attempted to identify only the turnover related to the generation of insights. This is a remarkably complex exercise given the discretion of many of these companies, but it remains a useful reminder of the ways in which the industry is developing.

Global Top-20 Reporting Companies

Gartner.

1st

6,267	6.10%	17.88%
2024 Turnover USD (M) *(Total)	Growth (2023-2024)	Sectorial Market Share

CoStar Group™

2nd

2024 Turnover USD (M) *(Total)	2,736
Growth (2023-2024)	11.45%
Sectorial Market Share	7.81%

S&P Global

3rd

2024 Turnover USD (M) *(Partial)	2,425
Growth (2023-2024)	8.94%
Sectorial Market Share	6.92%

*Total = Total company turnover; Partial = Only insights-related turnover

Global Top-20 Reporting Companies

*Total = Total company turnover;
Partial = Only insights-related turnover

Rank	Company	2024 Turnover (US$ M)*	Growth 2023/24	Sectorial Market Share	Fastest growing in the sector	Rank in Top 50	Main Segments Active in
1	Gartner	6,267 (Total)	6.10%	17.88%	12th	1st	Industry Reports & Research, Digital Data Analytics, and Consulting Firms
2	CoStar Group	2,736 (Total)	11.45%	7.81%	5th	8th	Industry Reports & Research, Digital Data Analytics
3	S&P Global (IHS Markit Energy, etc.)	2,425 (Partial)	8.94%	6.92%	8th	12th	Industry Reports & Research, Digital Data Analytics
4	Deloitte	1,855 (Partial)	5.83%	5.29%	13th	14th	Consulting Firms
5	McKinsey & Company	1,600 (Partial)	18.52%	4.56%	2nd	15th	Consulting Firms, EFM
6	Booz Allen Hamilton	1,279 (Partial)	15.15%	3.65%	4th	16th	Consulting Firms, Digital Data Analytics
7	Accenture	1,262 (Partial)	1.22%	3.60%	19th	17th	Consulting Firms, Industry Reports & Research, and Digital Data Analytics
8	Ernst & Young	1,075 (Partial)	4.49%	3.07%	16th	21st	Consulting Firms
9	Boston Consulting Group	891 (Partial)	9.76%	2.54%	7th	25th	Consulting Firms
10	J. D. Power	850 (Total)	5.67%	2.42%	14th	26th	Industry Reports & Research, Self-serve Research Platforms
11	KPMG	845 (Partial)	6.26%	2.41%	11th	27th	Consulting Firms, Consulting Firms
12	PwC	818 (Partial)	4.33%	2.33%	17th	28th	Consulting Firms
13	IDC (owned by IDG)	810 (Total)	2.53%	2.31%	18th	29th	Industry Reports & Research, Self-serve Research Platforms
14	Bain & Company	658 (Partial)	16.67%	1.88%	3rd	37th	Consulting Firms
15	Wood MacKenzie	600 (Total)	19.64%	1.71%	1st	38th	Industry Reports & Research
16	RAND Corporation	436 (Total)	9.97%	1.24%	6th	45th	Industry Reports & Research
17	Forrester	433 (Total)	-10.04%	1.24%	20th	47th	Industry Reports & Research, Consulting Firms, and Established Market Research
18	NORC at the University of Chicago	373 (Total)	6.89%	1.06%	10th	-	Industry Reports & Research
19	GlobalData	355 (Total)	4.53%	1.01%	15th	-	Industry Reports & Research
20	Oliver Wyman	339 (Partial)	8.58%	0.97%	9th	-	Consulting Firms

3. ESOMAR's Global Top-50 Insights Companies
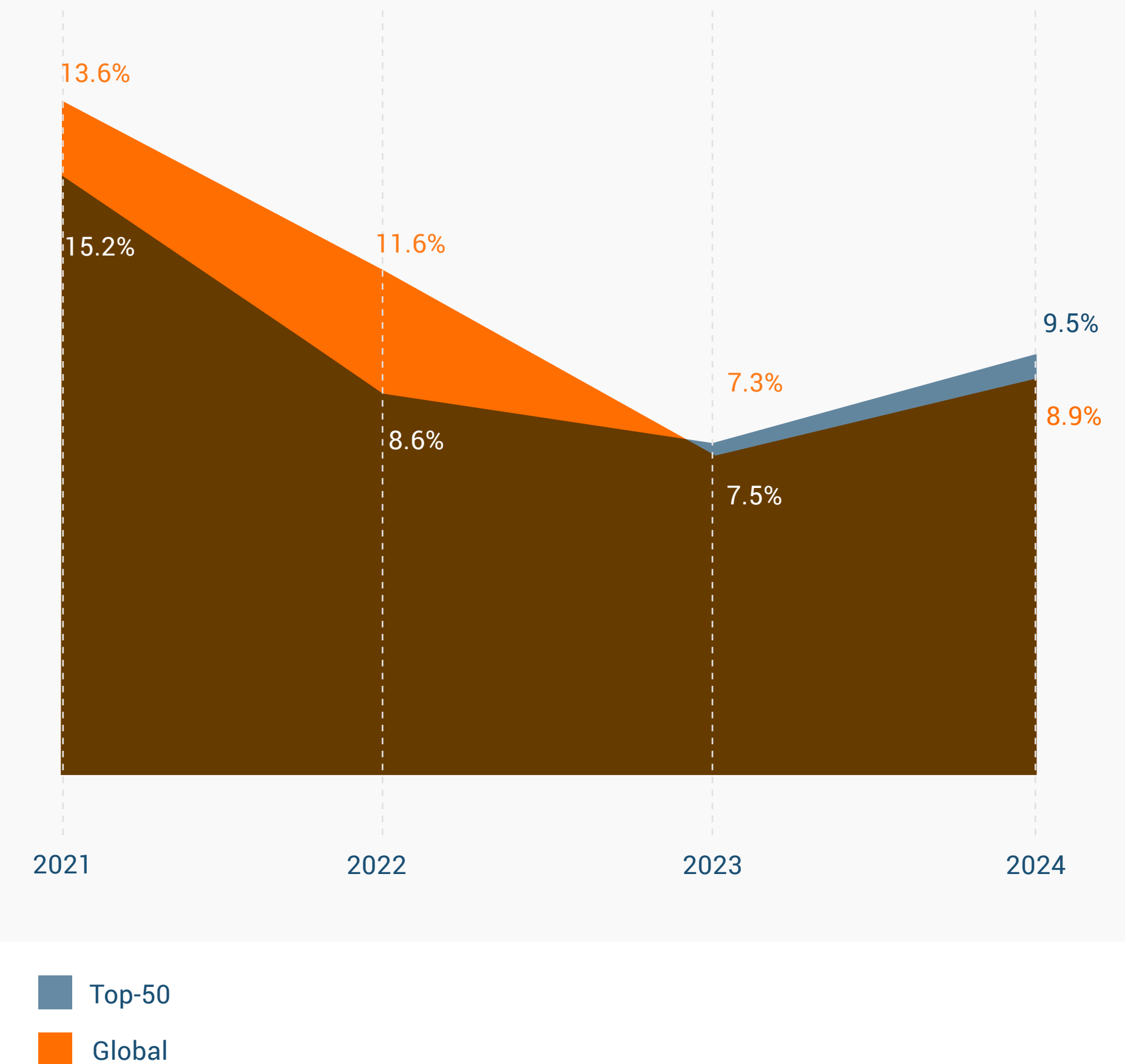
3.1. Surpassing global growth

Despite low levels of investment, the persistence of above-desirable inflation levels, and the sluggishness of interest rates to return to levels similar to those observed at the beginning of the century, the top 50 insights companies continue to show strong growth during 2024 and even managed to overtake that of the overall industry (10.45% versus 8.9%).

The final growth rate for the industry for 2024 will be made public with the publication of ESOMAR's *Global Market Research 2025* report later this year.

Despite the strong growth of the top 50, it is telling how the largest players continue to show moderate growth, particularly compared to companies in the middle of the ranking.

Overall, the top 50 insights companies have an aggregated market share of 52.4% and a combined turnover of US$77.3 bn, compared to an expected industry turnover of US$147.5 bn. The result is more than US$7.3 bn injected by the top 50 insights companies into the market over the course of 2024.

Year-over-year growth rate (%)

Legend:
- Top-50
- Global

Global: 13.6% (2021), 11.6% (2022), 7.3% (2023), 8.9% (2024)
Top-50: 15.2% (2021), 8.6% (2022), 7.5% (2023), 9.5% (2024)

Source for global growth:
Global Market Research 2024

3.2. Global share of the sectors

A look at the share of the sectorial distribution of the Top 50 companies provides us with an intuitive understanding of the level of consolidation that exists within each of the different business models in the industry.
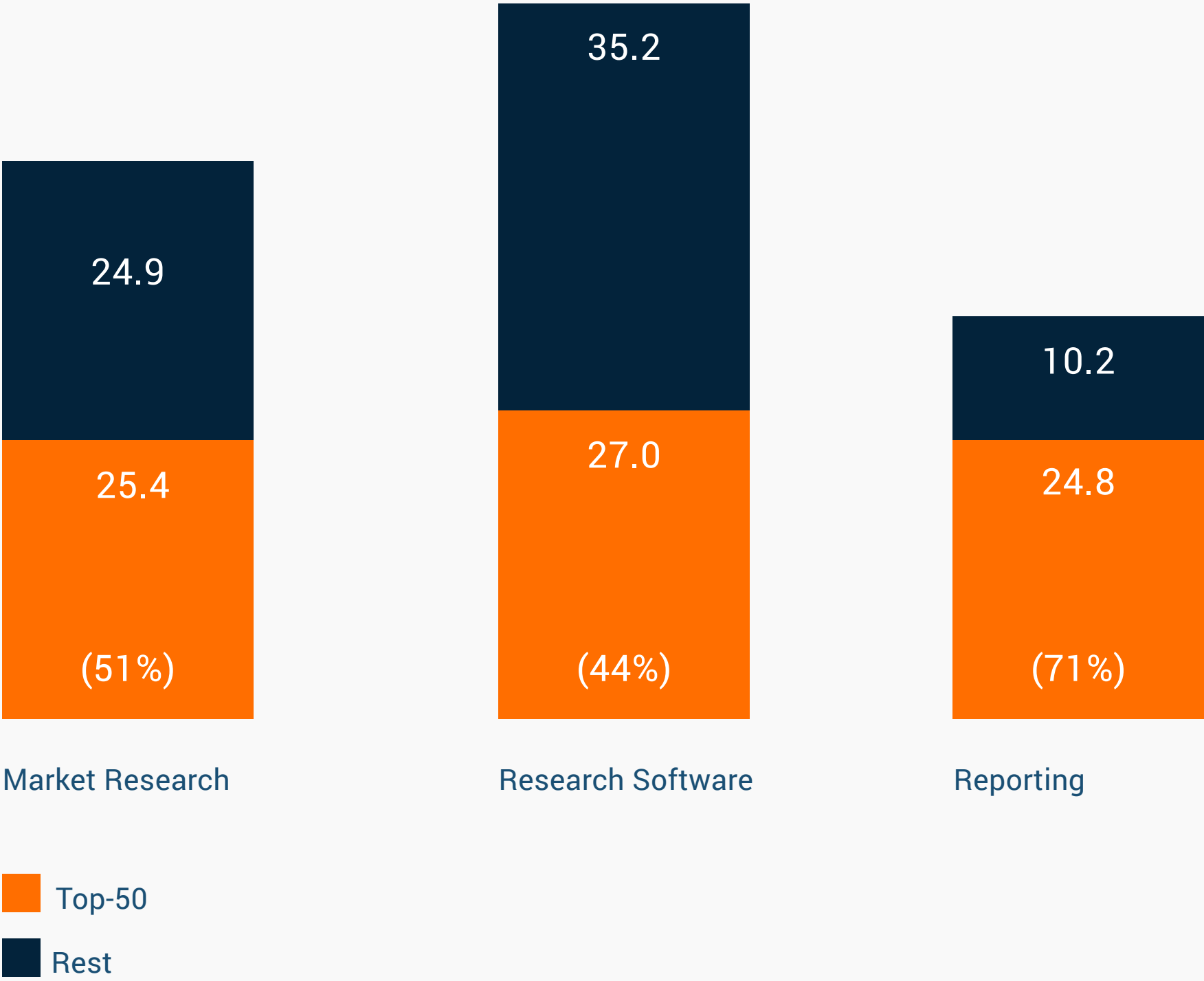
In this context, market research companies within the Top 50 take up 51% of their sector's global turnover. This sector is relatively mixed, and the merger between NIQ and GfK means that only 14 companies from this sector appear in the top 50 ranking.

Similarly, companies from the research software sector in the top 50 represent 44% of the total. This hints at a long tail of smaller players in this sector, even though only 19 make the top 50, just like in last year's edition of this ranking.

Lastly, the reporting (consultancy and business services) sector presents the highest concentration of turnover by the largest players, at almost 71%, a similar share as a year earlier.

It is worth noting that the ranking only includes turnover related to the generation of insights, to allow for an apples-with-apples comparison across the industry and account for firms with a wider variety of services than strictly insights generation.

Share of the Top-50 within their sector 2023 (US$ bn)

	Market Research	Research Software	Reporting
Rest	24.9	35.2	10.2
Top-50	25.4	27.0	24.8
	(51%)	(44%)	(71%)

Legend:
- Top-50
- Rest

3.3. Fastest growing firms

As implied in previous chapters, the comparatively moderate growth rate of the industry translates to less extreme growth rates across the board. In line with the 2023 results, only five companies present growth rates above 20%: Westat (fuelled by government contracts), Sprout Social, and three companies within data and analytics (HubSpot, Zeta Global, and Klaviyo).

While last year Klaviyo took the title as the fastest-growing company, this year it is overtaken by Westat and Zeta Global. It remains, nonetheless, remarkable that this company has continued to present such strong growth over the years.

The bulk of the ranking is taken by companies growing between 0 and 10%, increasing to 30 entries compared to last year's 26. Companies manage to sustain positive growth, despite it not being as significant, a consequence of the macroeconomic factors that dominated 2024.

We look forward to seeing the results of this ranking after 2025, a year that started with M&A movements across the board, which may have brought new areas of uncertainty and which may have likewise opened up new opportunities for all the players.

2023/24 Growth	Number	Breakdown of companies*
<0%	5	2 Established Market Research 1 Industry Reports & Research 1 Social Listening & Communities 1 Enterprise Feedback Management
0<x≤10%	30	8 Established Market Research 6 Consulting Firms 5 Digital Data Analytics 5 Industry Reports & Research 2 Social Listening & Communities 2 Self-serve Research Platforms 1 Enterprise Feedback Management 1 Sample Panel Provider
10<x≤20%	10	3 Digital Data Analytics 3 Consulting Firms 2 Industry Reports & Research 1 Established Market Research 1 Sample Panel Provider
>20%	5	3 Digital Data Analytics 1 Established Market Research 1 Social Listening & Communities

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

3.4. Changes in the ranking

The significant merger by NIQ and GfK at the top of the ranking gave the opportunity for many companies to gain places in the ranking passively, without necessarily having to overtake their peers. As a result, 17 companies gained places in the ranking compared to 14 last year.

It is interesting to notice, though, that more companies have gone down the ranking this year (21) than compared to last year, even though their composition varies substantially. Following a similar trend, up to seven companies within the digital data analytics segment moved up the ranking, whereas it seems that consulting firms are the ones that have overall lost the most.

Because of the integration of GfK into NIQ (which appears in fifth place after jumping seven places), companies that moved by two places in reality moved by one place. However, it is only in 19th place that a company jumps three places (Intuit).

At the top of the ranking, Ipsos, Circana, and S&P Global lose two places; Booz Allen Hamilton gains two; Adobe, HubSpot, and Qualtrics gain one; and Salesforce, Kantar, Deloitte, and Accenture lose one.

Six new companies make it to ESOMAR's 2025 Global Top 50 Insights Companies: Westat, dunnhumby, and Prodege (which did make the Global Top 20 Market Research Companies ranking); RAND Corporation (which did make the Global Top 20 Reporting (Consultancy and Business Services) Companies ranking); Sprout Social (which did make the Global Top 20 Research Software Companies ranking); and YouGov.

Position in ranking	Breakdown*
Gaining places 17 firms	7 Digital Data Analytics 4 Established Market Research 2 Consulting Firms 2 Industry Reports & Research 1 Self-serve Research Platforms 1 Social Listening & Communities
Remaining steady 6 firms	2 Established Market Research 2 Industry Reports & Research 1 Digital Data Analytics 1 Consulting Firms 1 Self-serve Research Platforms
Losing places 21 firms	6 Consulting 3 Established Market Research 3 Digital Data Analytics 3 Industry Reports & Research 2 Social Listening & Communities 2 Enterprise Feedback Management 1 Sample Panel Provider
New entrants 6 firms	3 Established Market Research 1 Industry Reports & Research 1 Social Listening & Communities 1 Sample Panel Provider

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

4. Largest market research companies per country

This data was reported by each of the world's countries[1] and shows the largest players, in alphabetical order, for each country.

Argentina
GfK
Kantar
Nielsen

Armenia
Breavis
IMR
MPG

Bangladesh
Kantar
Luminaries Research
Nielsen

Belgium
GfK
Human8
Ipsos

Bolivia
Captura Consulting
Ipsos CIESMORI
Kantar

Bulgaria
GfK
Ipsos
Nielsen

Chile
GfK
Ipsos
KANTAR

China
CTR
Ipsos
Nielsen

Colombia
Ac Nielsen De Colombia
Ipsos Napoleon Franco
Kantar Millward Brown

Croatia
AC Nielsen
Ipsos
Nielsen

Czech Republic
Ipsos
Kantar
NIQ

Dem. Rep. Congo
Ipsos
Kantar
Target

Finland
Kantar Media Finland Oy
Norstat Finland Oy
Taloustutkimus Oy

France
Ipsos
Kantar
The BVA Family

Georgia
ACT
Caucasus
IPM Market Intelligence

Germany
GfK
Ipsos
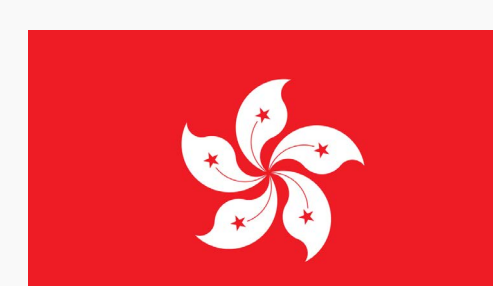Kantar

Ghana
Consumer Insights
Consult
Ipsos

Greece
Circana
Nielsen Consumer
Primeview

Guyana
Project Development
Consultancy
The Consultancy Group

Hong Kong
Ipsos
Kantar
Nielsen

Indonesia
Ipsos
Kantar
NIQ

Iran
Bazaarnegar
IRC Iran (AGAH)
Rahbar Bazaar

Iraq
IIACSS
Ipsos
GfK

Ireland
Behaviour & Attitudes Ltd
Neilson
RED C Research &
Marketing Ltd

Israel
Geocartography
Ipsos
Kantar

Italy
GfK
Ipsos
IQVIA

[1]Information related to the largest companies in 2023; data for 2024 will be published in due time. Not all countries disclosed this information. Data for Bangladesh, Czech Republic, Guyana, Iraq, Pakistan, Spain, Sri Lanka, United Kingdom, and Uruguay corresponds to 2022. Lebanon and South Pacific corresponds to 2021, Bolivia, Ghana, Israel, and Zimbabwe to 2020.

|			
Jamaica Blue Dot Hope Caribbean Market Strategy Limited	**Myanmar** Myanmar Survey Research Nielsen	**Poland** GfK Kantar Nielsen	**Spain** GfK Ipsos Kantar
Japan Cross Marketing INTAGE Macromill	**Netherlands** GfK Netherlands Ipsos Kantar Netherlands	**Portugal** IQVIA Marktest NIQ	**Sri Lanka** Kantar Nielsen PepperCube
Kazakhstan ACNielsen Kazakhstan IQVIA Solutions Kazakhstan K Research Central Asia	**New Zealand** Kantar Insights Nielsen Insights TRA	**Romania** Ipsos Kantar Nielsen	**Taiwan** Ipsos Kantar Nielsen
Kosovo Dots Kantar Ubo Consulting	**Nigeria** Ipsos Kantar Nielsen	**Russia** Ipsos Mediascope Nielsen	**Thailand** Ipsos Kantar Nielsen
Lebanon Ipsos Statistics Lebanon	**Norway** Kantar Norstat Opinion	**Singapore** GfK IQVIA Kantar	**Tunisia** EMRHOD International One To One Sigma Conseil
Malaysia Ipsos Kantar Nielsen	**Pakistan** AC Nielsen Ipsos Oula (formerly Kantar)	**Slovenia** AC Nielsen AGB Nielsen Mediana	**United Kingdom** Gartner Ipsos Kantar
Mexico Ipsos Kantar Nielesen IQ	**Peru** Ipsos Kantar Worldpanel Nielsen	**South Korea** HRC Ipsos Kantar	**Uruguay** Equipos Consultores Ibope Kantar Nielsen
Mongolia IRIM MMCG VMLY&R Mongolia	**Philippines** Kantar Nielsen PSRC	**South Pacific** Tebbutt Research	**USA** Gartner Nielsen Salesforce
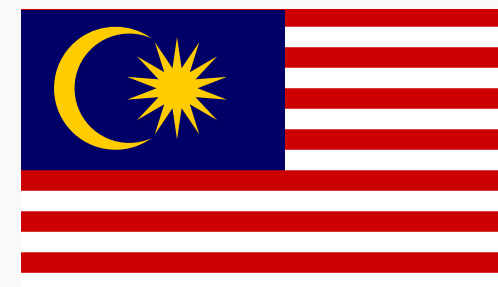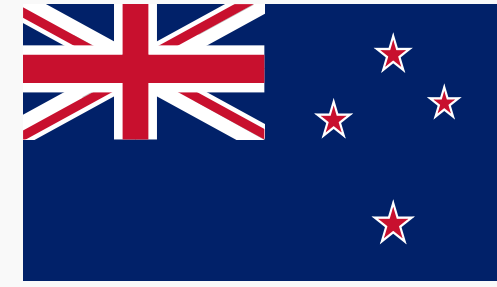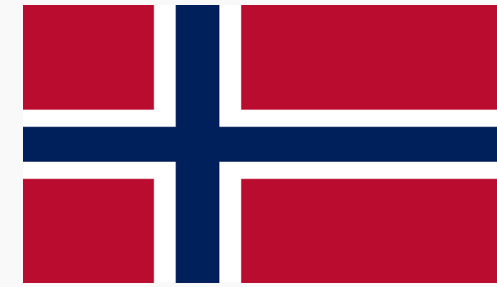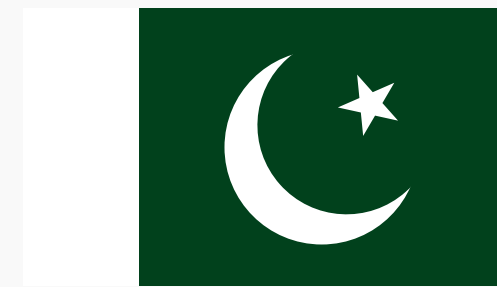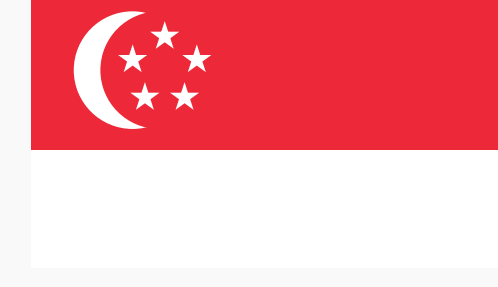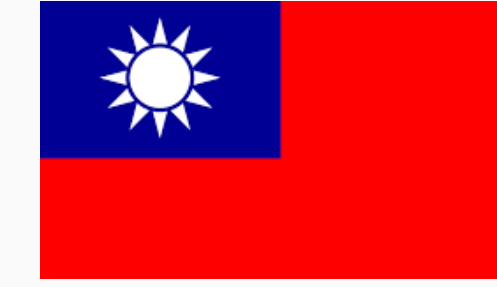
Vietnam

Ipsos
Kantar
Nielsen

Zimbabwe

Research International
Bureau
Select Research
Top Line Research
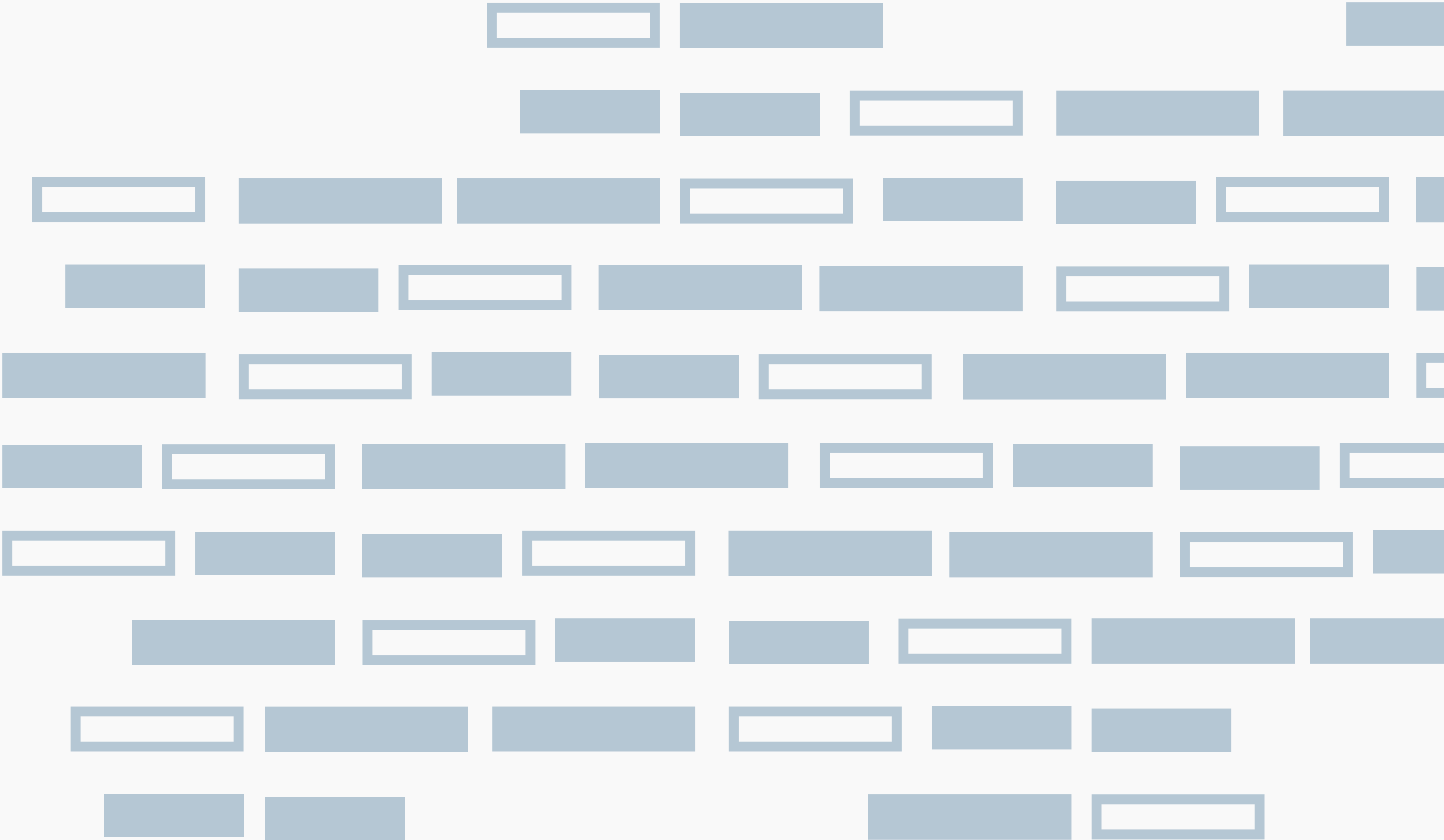
1st

(=) No change in 2024

Gartner

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:

CEO: Eugene A. Hall
CFO: Craig Safian
CIO: Altaf Rupani

30th
Fastest Growing

21,044*
2024 Total Insights Employees

Public

Stamford, Connecticutt, USA

1972

gartner.com

linkedin.com/company/gartner/

Industry Reports & Research, Digital Data Analytics, and Consulting Firms

Key Stats

2024 Turnover (US$ m) ^^(Total)	6,267
Growth (2023-2024) (%)	6.1

^^Total = Total company turnover;
* Number of employees from official financial statement/website

Latest News

Investors in Gartner (NYSE:IT) have seen strong returns of 234% over the past five years

Gartner Reports First Quarter 2025 Financial Results

Gartner Reports Fourth Quarter 2024 Financial Results

Flagship Products / Coverage Areas

Gartner Magic Quadrant
Gartner Hype Cycle
Gartner BuySmart
Gartner Score
Gartner Product Decisions
Gartner Digital IQ
Gartner Accelerators for CIOs

2nd

(=) No change in 2024

IQVIA

IQVIA

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:

CEO: Ari Bousbib
CFO: Ron Bruehlman
CHRO: Trudy Stein

36th
Fastest Growing

32,535**
2024 Total Insights Employees

Public

Durham, North Carolina, USA

2016

iqvia.com

linkedin.com/company/iqvia/

Established Market Research, Digital Data Analytics

Key Stats

2024 Turnover (US$ m) ^(Partial)	5,828
Growth (2023-2024) (%)	3.77

^Partial = Only insights-related turnover
** Estimated number

Latest News

IQVIA and NVIDIA Collaborate to Transform Healthcare and Life Sciences Through Advanced Agentic AI Solutions

IQVIA Announces IQVIA AI Assistant, Powered by IQVIA Healthcare-grade AI™

IQVIA Reports First-Quarter 2025 Results

Flagship Products / Coverage Areas

ARK Patent Intelligence
IQVIA Insights
IQVIA Institute
IQVIA MIDAS

3rd (+1)

Adobe

Adobe Experience Platform is a technology platform that unifies critical customer data in real time, including CRM, first-party, behavioral, transactional, financial, operational, and third-party data. It standardizes and enriches this data, enabling action across channels and helping companies understand customer needs and deliver tailored experiences.

Top C Level People:

CEO: Shantanu Narayen
CFO: Dan Durn
CMO: Lara Balazs

20th
Fastest Growing

7,661**
2023 Total Insights Employees

Public

San Jose, California, USA

1982

adobe.com

linkedin.com/company/adobe

Digital Data Analytics, EFM

Key Stats

2024 Turnover (US$ m) ^(Partial)	5,388
Growth (2023-2024) (%)	9.67

^Partial = Only insights-related turnover
** Estimated number

Latest News

Adobe Introduces New AI-Powered Video Tools in Adobe Express for Intuitive Content Creation

Adobe Summit 2025: Adobe AI Platform Unites Creativity and Marketing to Define the New Era of Customer Experience Orchestration

Adobe Delivers Record Q1 Results

Flagship Products / Coverage Areas

Adobe Experience Cloud
(other products not inlcuded)

4th (-1)

salesforce

Salesforce

The Commerce Cloud aims to improve revenue and facilitate the sales processes. The Marketing Cloud aims to educate potential customers about a company's goods and services, nurture leads, and turn them into prospects

Top C Level People:

CEO: Marc Benioff
CFO: Robin Washington
CTO: Parker Harris

26th
Fastest Growing

10,999**
2024 Total Insights Employees

| Public | San Francisco, California, USA | 1999 | salesforce.com | linkedin.com/ company/ salesforce/ | Digital Data Analytics also EFM and Social Listening and Communities |

Key Stats

2024 Turnover (US$ m) ^(Partial)	5,281
Growth (2023-2024) (%)	7.51

^Partial = Only insights-related turnover
** Estimated number

Latest News

Introducing Agentforce 2.0: The Digital Labor Platform for Building a Limitless Workforce

Salesforce Signs Definitive Agreement to Acquire Informatica

Salesforce Reports Record First Quarter Fiscal 2026 Results Exceeds Guidance Across All Metrics; cRPO up 12% Y/Y

Flagship Products / Coverage Areas

Marketing Cloud
Commerce Cloud
(other products not included)

5th (+7)

NIQ

NielsenIQ

NIQ (NielsenIQ) is a global leader in consumer intelligence, providing data, analytics, and insights that help brands and retailers understand behavior and market trends. Through advanced measurement and technology, NIQ enables smarter decisions and business growth.

Top C Level People:

CEO: Jim Peck
CFO: Mike Burwell
CTO: Mohit Kapoor

9th
Fastest Growing

30,000*
2024 Total Insights Employees

| Private | New York, New York, USA | 1923 | nielseniq.com | linkedin.com/ company/ nielseniq/ | Established Market Research, Digital Data Analytics |

Key Stats

2024 Turnover (US$ m) ^^(Total)	3,973
Growth (2023-2024) (%)	18.9

^^Total = Total company turnover
* Number of employees from official financial statement/website
Note: At the time of this publication, NIQ has filed for IPO.

Latest News

NielsenIQ and VusionGroup Launch Strategic Alliance to Transform Physical Retail Through Advanced Data and Cutting-Edge AI-Powered Solutions

NIQ signs definitive agreement to acquire Gastrograph AI Further Enhancing CPG Innovation through AI-Driven Data, Platforms, and Capabilities

IQ Unveils BASES AI Screener: Helping CPG Brands Thrive in the Age of Hyper-Innovation

Flagship Products / Coverage Areas

Retail Measurement Services
Consumer Panel
NIQ BASES
NIQ Brand Architect
Foxintelligence
Omnisales

6th (-1)

Nielsen

Nielsen is an audience measurement, data and analytics, 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.

Top C Level People:

CEO: Karthik Rao
CFO: Jessica Holscott
CLO: George D. Callard

49th
Fastest Growing

10,000*
2024 Total Insights Employees

Private	
New York, New York, USA	
1923	
nielsen.com	
linkedin.com/company/nielsen	
Established Market Research, Social Listening and Communities, and Digital Data Analytics	

Key Stats

2024 Turnover (US$ m) ^^(Total)	3,400
Growth (2023-2024) (%)	-2.86

^^Total = Total company turnover
* Number of employees from official financial statement/website

Latest News

Nielsen and Acxiom Collaborate to Bring Increased Connectivity to Advanced Audiences

Nielsen and TransUnion Collaborate to Enable Measurement and Increased Accessibility to Advanced Audiences

Nielsen launches activation with Advanced Audiences, enhancing digital campaign precision, reach and effectiveness across New Zealand

Flagship Products / Coverage Areas

Nielsen ONE
Audience Segments
Marketing Mix Modelling
Gracenote ID

7th (-1)

KANTAR

Kantar

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.

Top C Level People:

CEO: Chris Jansen
CFO: Michael Uzielli
CTO: Mark Kimber

48th
Fastest Growing

28,000*
2024 Total Insights Employees

| Private | London, England, UK | 1993 | kantar.com | linkedin.com/ company/kantar | Established Market Research also Sample Panel Providers and Self-serve Research Platforms |

Key Stats

2024 Turnover (US$ m) ^^(Total)	2,913
Growth (2023-2024) (%)	-2.23

^^Total = Total company turnover
* Number of employees from official financial statement/website

Latest News

Kantar AI Lab exits 'stealth mode' with new AI assistant & product roadmap

Kantar unveils product launch evaluation tool LaunchEvaluate

Announcement of the Kantar Group's Q1 2025 results

Flagship Products / Coverage Areas

Matrix
Needscope
Link+
LIFT
Survey Design & Consultation
Global Panel Management

8th

(=) No change in 2023

CoStar Group™

CoStar Group

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:

CEO: Andy Florance
CFO: Christian M. Lown
CTO: Frank Simuro

14th
Fastest Growing

6,600*
2024 Total Insights Employees

| Public | Washington DC, USA | 1987 | costargroup.com | linkedin.com/ company/costar- group | Industry Reports & Research, Digital Data Analytics |

Key Stats

2024 Turnover (US$ m) ^^(Total)	2,736
Growth (2023-2024) (%)	11.45

^^Total = Total company turnover

* Number of employees from official financial statement/website

Latest News

CoStar Group Completes Acquisition of Matterport, Ushering in a New Era of 3D Digital Twins and AI-Powered Real Estate Innovation

CoStar Group First Quarter 2025 Revenue Increased 12% Year-over-Year

Costar group enters binding agreement to acquire leading australian property marketplace domain holdings

Flagship Products / Coverage Areas

STR
Ten-X
LoopNet
Apartments.com
Homes.com
BizBuySell
Land.com

9th (-2)

Ipsos

Ipsos is a global market research company specializing in advertising, loyalty, marketing, media, and public affairs research.

Top C Level People:

CEO: Ben Page
CFO: Dan Lévy
COO: Michel Guidi

40th
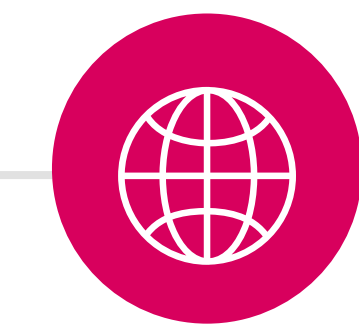Fastest Growing

19,000*
2024 Total Insights Employees

Public

Paris, France

1975

ipsos.com

linkedin.com/company/ipsos

Established Market Research also Digital Data Analytics

Key Stats

2024 Turnover (US$ m) ^^(Total)	2,640
Growth (2023-2024) (%)	1.3

^^Total = Total company turnover
* Number of employees from official financial statement/website

Latest News

Ipsos Launches AI-Powered Risk Informer for Real-Time, Project-Based Risk Monitoring

Ipsos announces India launch of Creative|Spark AI, an ad testing solution generating actionable insights within minutes

Ipsos acquires Jarmany, a company specialising in data management and analytics in the UK

Flagship Products / Coverage Areas

Ipsos UU Qualitative
Ipsos MMA
Ipsos.digital Platform
Brand Health Tracking
Observer
Healthcare
Public Affairs

10th (+1)

HubSpot

HubSpot is a leading customer platform that offers integrated software for marketing, sales, customer service, and CRM. It helps businesses attract, engage, and retain customers by streamlining operations and enhancing the customer experience.

Top C Level People:

CEO: Yamini Rangan
CFO: Kate Bueker
CTO: Dharmesh Shah

5th
Fastest Growing

8,500*
2024 Total Insights Employees

Public

Cambridge, Massachusetts, USA

2006

hubspot.com

linkedin.com/company/hubspot/

Digital Data Analytics, EFM, and Self-serve Research Platforms

Key Stats

2024 Turnover (US$ m) ^^(Total)	2,628
Growth (2023-2024) (%)	21.07

^^Total = Total company turnover
* Number of employees from official financial statement/website

Latest News

HubSpot to acquire Dashworks to accelerate vision of giving every GTM team member an AI assistant

Vision and velocity: HubSpot launches 200+ features to help SMBs move fast

HubSpot Reports Q1 2025 Results

Flagship Products / Coverage Areas

Marketing Hub
Sales Hub
Operations Hub
Commerce Hub
Breeze
Smart CRM

11th (-2)

Circana.

24th
Fastest Growing

___

Private

Chicago, Illinois, USA

www.circana.com

Established Market Research, Sample Panel Providers

Key Stats

2024 Turnover (US$ m) ^^(Total)	2,550
Growth (2023-2024) (%)	8.79

12th (-1)

S&P Global

23rd
Fastest Growing

___

Public

London, England, UK

www.spglobal.com

Industry Reports & Research, Digital Data Analytics

Key Stats

2024 Turnover (US$ m) ^(Partial)	2,425
Growth (2023-2024) (%)	8.94

^Partial = Only insights-related turnover; ^^Total = Total company turnover

13th (+1)

qualtrics XM

21st
Fastest Growing

Private

Provo, Utah, USA

www.qualtrics.com

Self-serve Research Platforms

Key Stats

2024 Turnover (US$ m) ^^(Total)	1,860
Growth (2023-2024) (%)	9.41

14th (-1)

Deloitte.

31st
Fastest Growing

Private

London, England, UK

www.deloitte.com

Consulting Firms

Key Stats

2024 Turnover (US$ m) ^(Partial)	1,855
Growth (2023-2024) (%)	5.83

^Partial = Only insights-related turnover; ^^Total = Total company turnover

15th (=)

McKinsey & Company

10th
Fastest Growing

Private

New York, New York, USA

www.mckinsey.com

Consulting Firms, EFM

Key Stats

2024 Turnover (US$ m) ^(Partial)	1,600
Growth (2023-2024) (%)	18.52

16th (+2)

Booz Allen

12th
Fastest Growing

Public

Mclean, Virginia, USA

www.boozallen.com

Consulting Firms, Digital Data Analytics

Key Stats

2024 Turnover (US$ m) ^(Partial)	1,279
Growth (2023-2024) (%)	8.94

^Partial = Only insights-related turnover

Accenture

17th (-1)

Public

Dublin, Ireland

www.accenture.com

Consulting Firms, Industry Reports & Research, and Digital Data Analytics

42nd
Fastest Growing

Key Stats

2024 Turnover (US$ m) ^(Partial)	1,262
Growth (2023-2024) (%)	1.22

INTUIT

18th (+3)

Public

Atlanta, Georgia, USA

www.intuit.com

Digital Data Analytics, Established Market Research

7th
Fastest Growing

Key Stats

2024 Turnover (US$ m) ^(Partial)	1,223
Growth (2023-2024) (%)	19.75

^Partial = Only insights-related turnover; ^^Total = Total company turnover

19th (=)

NiCE

26th
Fastest Growing

Public

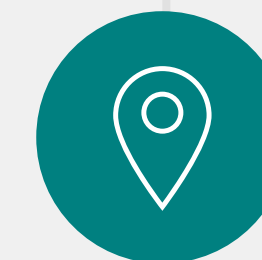Ra'anana, Israel

nice.com

Digital Data Analytics

Key Stats

2024 Turnover (US$ m) ^(Partial)	1,187
Growth (2023-2024) (%)	8.49

20th (+3)

lightspeed

6th
Fastest Growing

Public

Montreal, Quebec, Canada

www.lightspeedhq.com

Digital Data Analytics

Key Stats

2024 Turnover (US$ m) ^^(Total)	1,091
Growth (2023-2024) (%)	19.99

^Partial = Only insights-related turnover; ^^Total = Total company turnover

21st (-1)

EY

33rd
Fastest Growing

Private
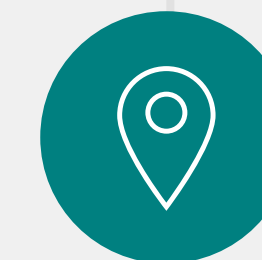
London, England, UK

www.ey.com

Consulting Firms

Key Stats

2024 Turnover (US$ m) ^(Partial)	1,075
Growth (2023-2024) (%)	4.49

22nd (+8)

ZETA

2nd
Fastest Growing

Public

New York, New York, USA

www.zetaglobal.com

Digital Data Analytics, Consulting Firms

Key Stats

2024 Turnover (US$ m) ^^(Total)	1,006
Growth (2023-2024) (%)	38.02

^Partial = Only insights-related turnover; ^^Total = Total company turnover

klaviyo

23rd (+9)

3rd
Fastest Growing

Public

Boston, Massachusetts, USA

www.klaviyo.com

Digital Data Analytics

Key Stats

2024 Turnover (US$ m) ^(Total)	937
Growth (2023-2024) (%)	34.29

CISION

24th (-2)

46th
Fastest Growing

Private

Chicago, Illinois, USA

www.cision.com

Social Listening & Communities

Key Stats

2024 Turnover (US$ m) ^(Total)	911
Growth (2023-2024) (%)	-0.11

^Partial = Only insights-related turnover; ^^Total = Total company turnover

25th (-1)

BCG

18th
Fastest Growing

Private

Boston, Massachusetts, USA

www.bcg.com

Consulting Firms

Key Stats

2024 Turnover (US$ m) ^(Partial)	891
Growth (2023-2024) (%)	9.76

^Partial = Only insights-related turnover

Top 26-50 Companies 2024

Official Rank	Company Name	2024 Turnover (US$ m)	Growth 2023/24	2024 Rank	Fastest Growing	Main Segments Active in
26	J. D. Power	850 (Total turnover)	5.67%	26 (+ 9)	32nd	Industry Reports & Research, Self-serve Research Platforms
27	KPMG	845 (Partial turnover)	6.26%	27 (- 2)	29th	Consulting Firms, Consulting Firms
28	PwC	818 (Partial turnover)	4.33%	28 (- 1)	34th	Consulting Firms
29	IDC (owned by IDG)	810 (Total turnover)	2.53%	29 (- 3)	38th	Industry Reports & Research, Self-serve Research Platforms
30	Sprinklr	796 (Total turnover)	8.74%	30 (- 1)	25th	Social Listening & Communities
31	Oracle Corporation	768 (Partial turnover)	3.85%	31 (- 3)	35th	Digital Data Analytics, EFM
32	LiveRamp	746 (Total turnover)	13.02%	32 (+ 5)	13th	Digital Data Analytics, Industry Reports & Research, and Established Market Research
33	Gerson Lehrman Group (GLG)	725 (Total turnover)	9.02%	33 (+ 3)	22nd	Established Market Research, Self-serve Research Platforms, and Established Market Research
34	Medallia	710 (Total turnover)	1.43%	34 (- 3)	39th	Enterprise Feedback Management, Self-serve Research Platforms
35	Sitecore	690 (Total turnover)	0.29%	35 (- 2)	45th	Digital Data Analytics, Digital Data Analytics
36	Dynata	685 (Total turnover)	1.03%	36 (- 2)	43rd	Sample Panel Providers, Social Listening and Communities, and Established Market Research
37	Bain & Company	658 (Partial turnover)	16.67%	37 (+ 1)	11th	Consulting Firms
38	Wood MacKenzie	600 (Total turnover)	19.64%	38 (+ 10)	8th	Industry Reports & Research
39	Alphasights	536 (Total turnover)	9.97%	39 (+ 3)	16th	Established Market Research, Digital Data Analytics

Official Rank	Company Name	2024 Turnover (US$ m)	Growth 2023/24	2024 Rank	Fastest Growing	Main Segments Active in
40	INTAGE	485 (Total turnover)	9.67%	40 (+ 5)	19th	Established Market Research
41	SurveyMonkey	481 (Total turnover)	1.24%	41 (=)	41st	Self-serve Research Platforms
42	Westat	467 (Total turnover)	62.37%	42 (New)	1st	Established Market Research
43	Meltwater Group	460 (Total turnover)	2.79%	43 (+ 1)	37th	Social Listening & Communities, Digital Data Analytics
44	Verint Systems	455 (Partial turnover)	-0.13%	44 (- 1)	47th	Enterprise Feedback Management
45	RAND Corporation	436 (Total turnover)	9.97%	45 (New)	17th	Industry Reports & Research
46	dunnhumby	433 (Total turnover)	6.99%	46 (New)	28th	Established Market Research
47	Forrester	433 (Total turnover)	-10.04%	47 (- 7)	50th	Industry Reports & Research, Consulting Firms, and Established Market Re-
48	YouGov^	417 (Total turnover)	0.60%	48 (New)	44th	Established Market Research
49	Sprout Social	406 (Total turnover)	30.94%	49 (New)	4th	Social Listening & Communities
50	Prodege^	380 (Total turnover)	10.14%	50 (New)	15th	Sample Panel Providers

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 countries and identifies the amount of "undeclared" turnover in the industry that may otherwise remain hidden at regional and global levels.
This data, furthermore, is categorised by each of the three current branches within the industry:
- Market research corresponding primarily to full-service market research agencies and sample panel providers,
- Research software firms corresponding primarily to subscription models like DaaS and SaaS, digital data analysis, social listening and communities, self-serve research platforms and enterprise feedback management; and
- Reporting activity composed by consultancy firms and companies dedicated to industry reports and research.

Please refer to the glossary for definitions of these terms.

Outsell bases the information in this report on their own comprehensive and rigorous methodology. This methodology provides financial estimates for the overall market and specific companies in the ecosystem. Outsell's methodology starts with its ever-growing database of over 10,000 global data and information companies assigned to all appropriate segments in which they operate.

Outsell uses all publicly available information and its own insights 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 segments 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.

Readers of ESOMAR's Global Market Research 2024 may observe that the market research sector's turnover published in that report for the year 2023 appears relatively higher than the one reported in this edition of the Global Top Insights Companies. This variation arises from a refinement in the methodology by accounting for unobserved subcontracted services across countries which resulted in a certain amount of double-counting globally. By estimating this "hidden" figure, we attempt to portray a level of turnover more aligned with the reality and fit for ESOMAR's reports.

Outsell does not include external pass-through revenue, where reported in public companies' financial statements. Pass-through revenue is often work that comes from an external supplier or partner and is transferred "at cost" to the client, meaning there is no markup or margin made off the work. Outsell finds pass-through revenue called out frequently by agency holding companies with 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.

Outsell converts all stated and estimated revenue figures across different currencies into US dollars to facilitate comparisons over time and between companies. To make these calculations, Outsell uses the 365-day historical average of published FOREX rates as compared to the US dollar. This methodology is consistently applied to ensure an accurate comparison of US dollar results.

As an example, in 2022, fluctuation in currency rates relative to the US dollar showed some impact on the conversion of reported results. Such was the case for the euro, which had an FX effect in 2022 of -11%; this means that a company's revenue if reported in euros that had zero local growth would show an 11% decrease when its revenues are displayed in US dollars. A similar case can be expected for 2024.

Some companies may have revised turnovers for 2023 in light of improved information. In these cases, the most recent data is used to recalculate the 2023 ranking and compare it to 2024. While, on the surface, this may create a conflict when looking at the 2023 ranking in the 2024 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 worldwide.

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.

5.2. Glossary

Primary research: 'New' or 'original' research that collects data from source in order to answer a question or gain a better 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 a better 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 in order to formulate convincing and credible answers to the questions that have been posed.

Active methods of research: Ways to gather data that 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 information generation, for the researcher to use to generate insights.

Market research sector: Project-based research agencies and sample panel providers. Agencies are full-service established market research providers (market, opinion, and social research, including data analytics applied for research purposes). Fieldwork providers include sample panel providers, and data providers. Examples of established market research firms include IQVIA, Kantar, and Ipsos. Examples of sample panel providers include Dynata, Prodege and CINT AB.

Research software sector: Data-as-a-Service (DaaS), Software-as-a-Service (SaaS), data analytics solutions (web analytics firms, social listening and communities platforms, CRM…), self-serve research platforms (formerly known as DIY services) and enterprise feedback management (EFM). Examples of digital data analytics include Salesforce, Adobe, and NICE Systems. Examples of social listening and communities include Cision AB, Sprinklr, and Meltwater Group. Examples of self-serve research platforms include Qualtrics, SurveyMonkey, and UserTesting. Examples of enterprise feedback management include Medallia, Verint Systems, and InMoment.

Reporting (Consultancy and Business Services): Includes consultancy and industry reports firms. Examples of consulting firm research companies include Deloitte, McKinsey & Co., and Booz Allen Hamilton. Examples of industry reports companies include Gartner, CoStar, and IHS Markit.

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 panels, audience measurement, social media and communities, online/web analytics, retail audits, consumer household panels, location-based services, passive metering, and log-file processing.

Qualitative research methods: Research with an emphasis 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, and online research communities.

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India	Mitali Chowhan	MRSI - Market Research Society Of India (A)
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Country	Name	Organization
Mongolia	Davaasuren Chuluunbat	Mongolian Marketing Consulting Group
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Morocco	Siham Malek	-
Myanmar	Marita Schimpl (R)	MSR - Myanmar Survey Research
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Nicaragua	Jorge Martín Frech	MERCAPLAN Central America & Caribbean
Nigeria	Paul Nnanwobu	NiMRA - Nigeria Market Research Association (A)
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Norway	Pål Listuen (R)	Norstat
Panama	Jorge Martín Frech (R)	MERCAPLAN Central America & Caribbean
Paraguay	Pedro Perez	ICA Consultoría Estratégica
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Peru	Urpi Torrado (R)	Datum Internacional
Philippines	Rhea Ensamtan	MORES - Marketing and Opinion Research Society of the Philippines
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Country	Name	Organization
Poland	Piotr Chojnowski	OFBOR - Polish Society of Market and Opinion Researchers (A)
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