

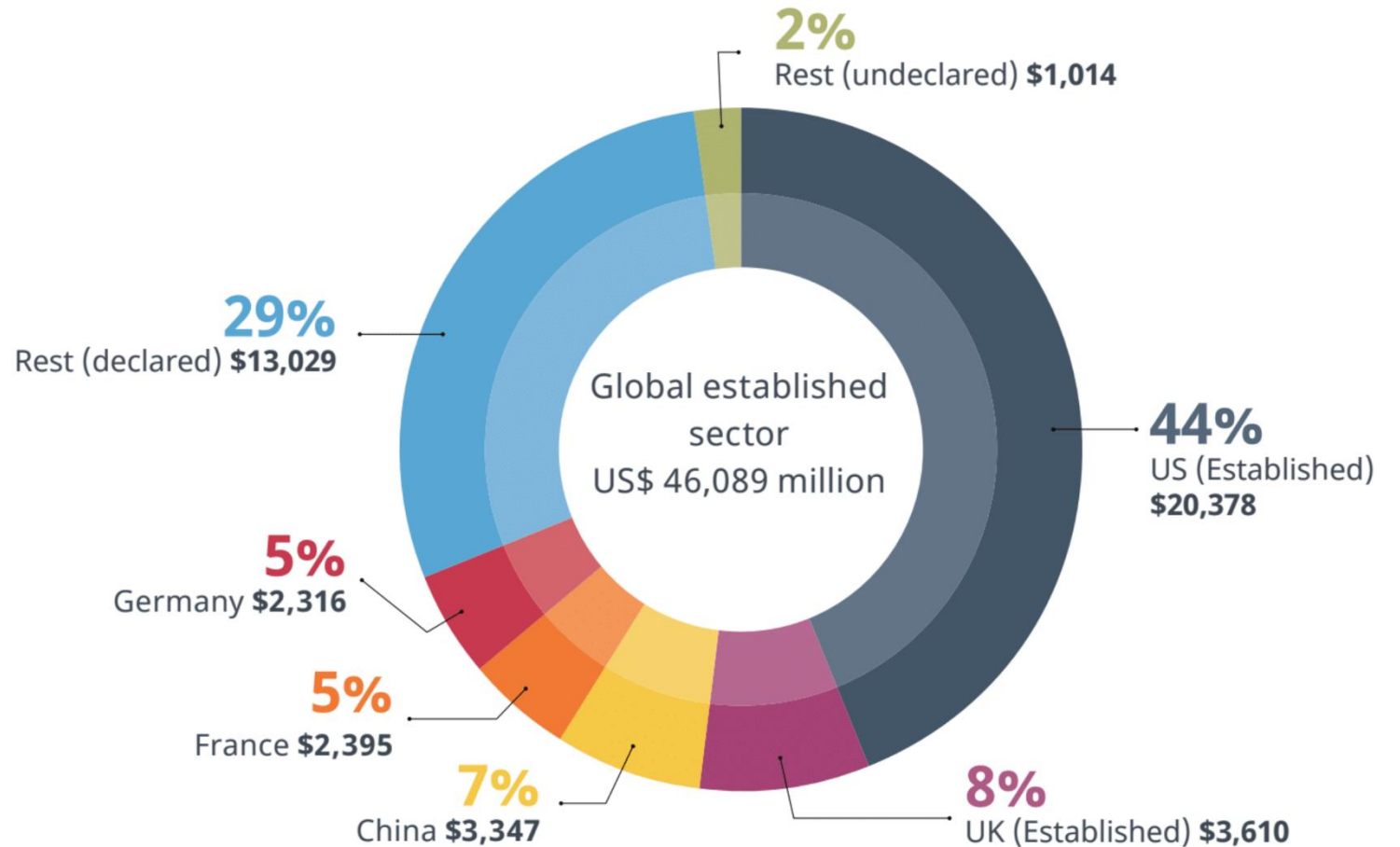


THRIVING

(NOT JUST SURVIVING...)

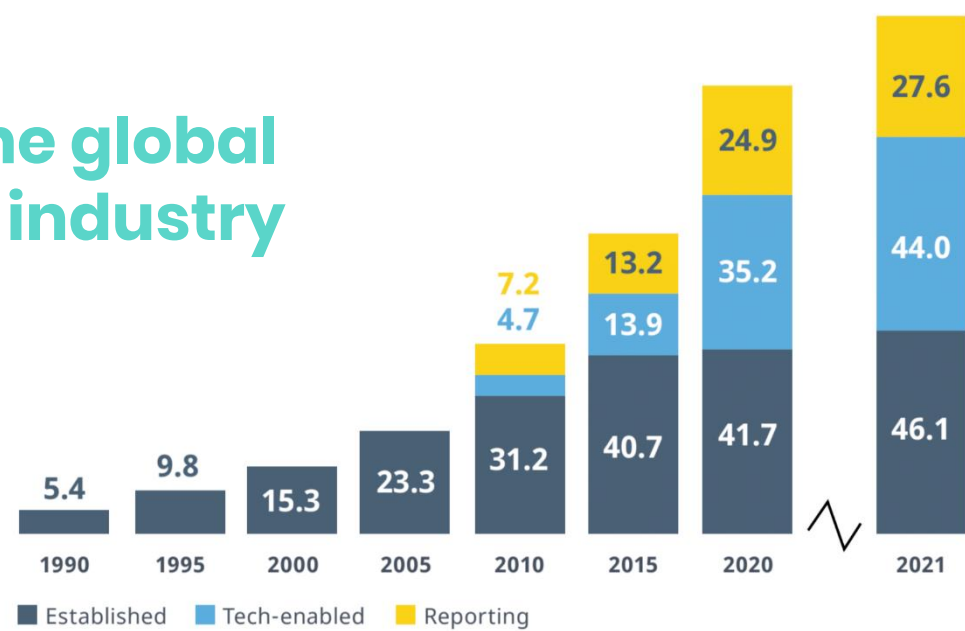
IN TURBULENT TIMES

Insights & Analytics is now a..... \$119B INDUSTRY



SECTOR GROWTH

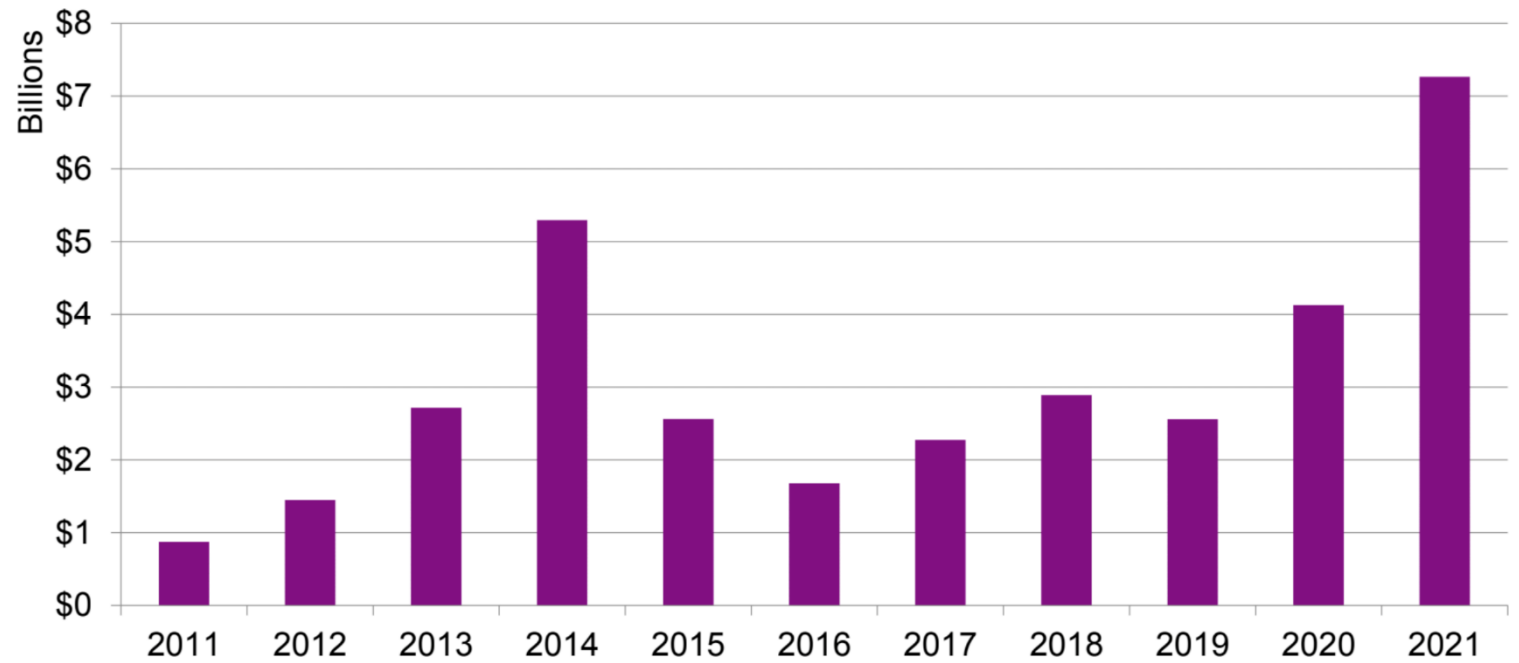
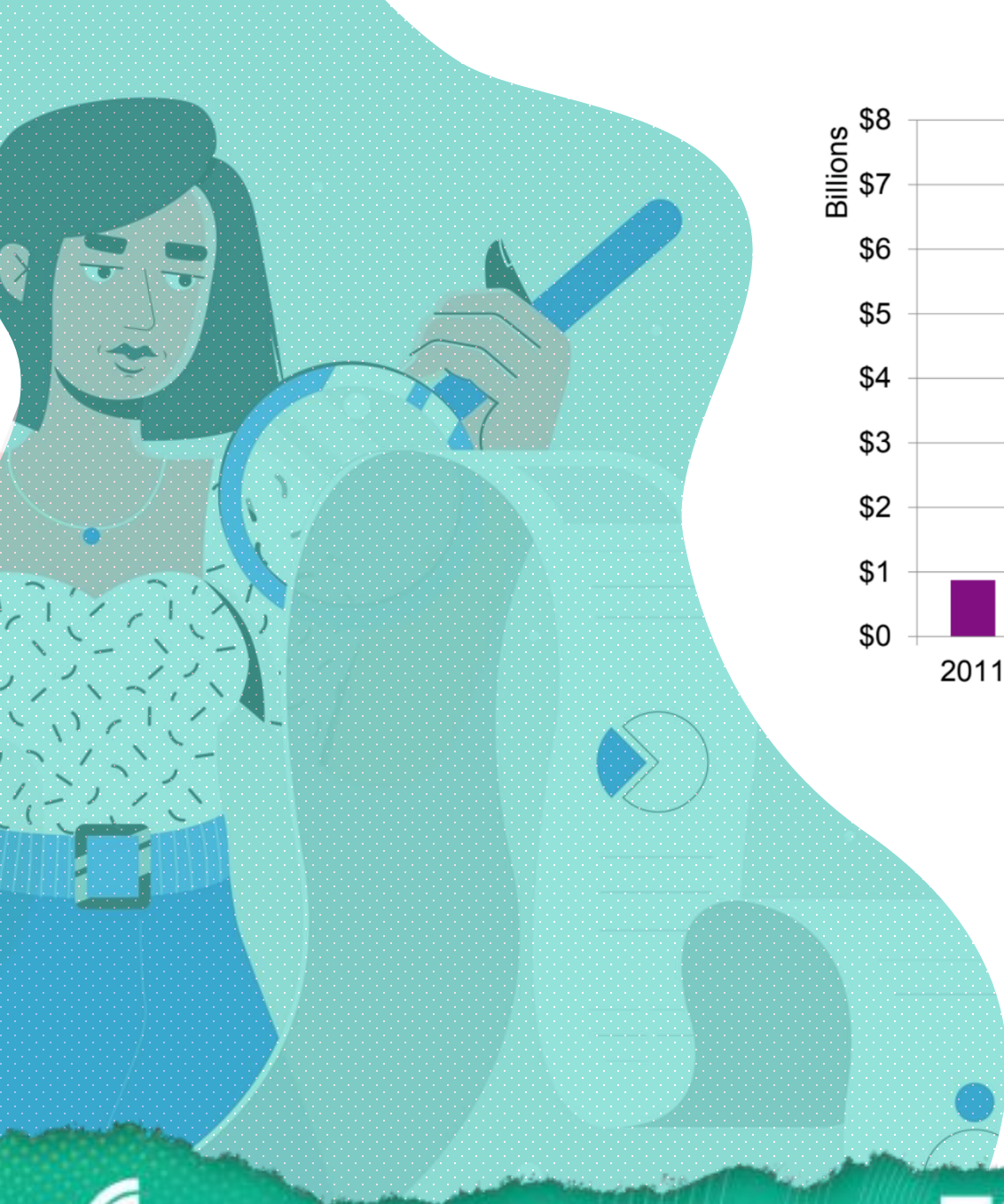
Size of the global insights industry



(In US\$ billion)	2019	2020	2021	2020/21 Growth	Total share
Established Research	39.54	41.69	46.09	9.1%	38.8%
<i>(of which Sample Panel Providers)</i>	1.48	1.64	1.92	15.3%	1.6%
Digital Data Analytics (MarTech)	19.33	21.62	26.95	23.1%	22.7%
Social Listening and Communities	8.56	9.72	12.13	23.1%	10.2%
Self-service Platforms	1.53	1.99	2.58	28.1%	2.2%
Enterprise Feedback Management	1.73	1.88	2.31	21.7%	1.9%
Total Tech-enabled Research	31.14	35.20	43.97	23.7%	37.0%
Industry Reports and Research	13.39	12.99	14.72	12.1%	12.4%
Consulting Firms	11.29	11.88	12.85	7.1%	10.8%
Total Reporting	24.69	24.87	27.57	9.7%	23.2%
Total	95.37	101.93	118.80	15.2%	-



What's Driving **GROWTH?**



Total investment in research and analytics 2011 – 2021

FOLLOW THE MONEY...



Venture Capital and Private Equity
flush with funds—looking
for places to put them



2021 saw a surge in VC investments
to \$330 billion—2x 2021
(which was also a record year)

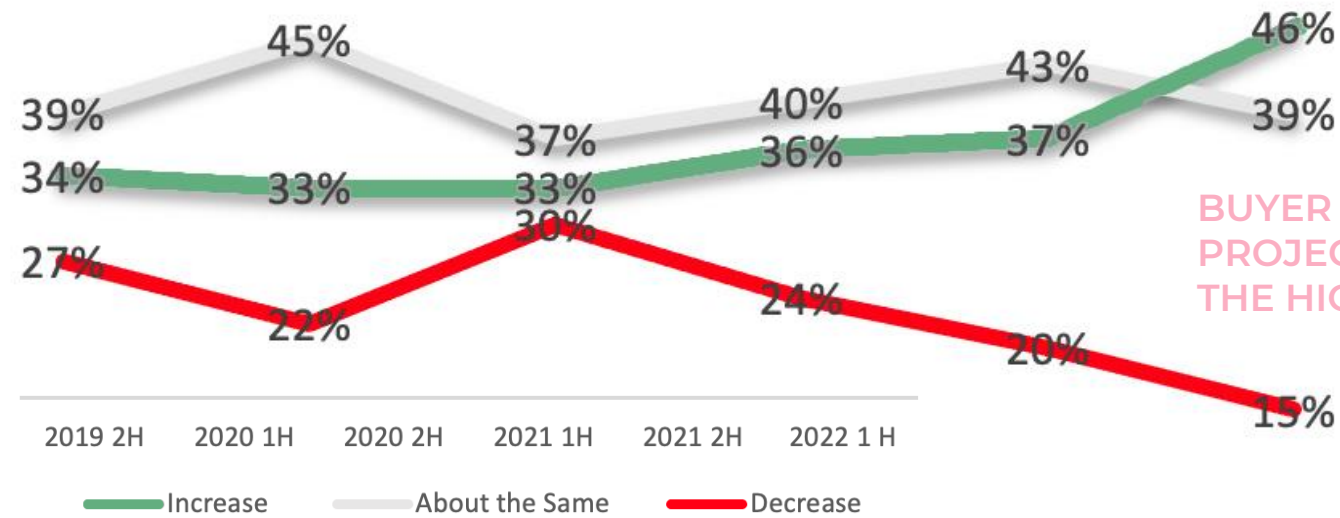
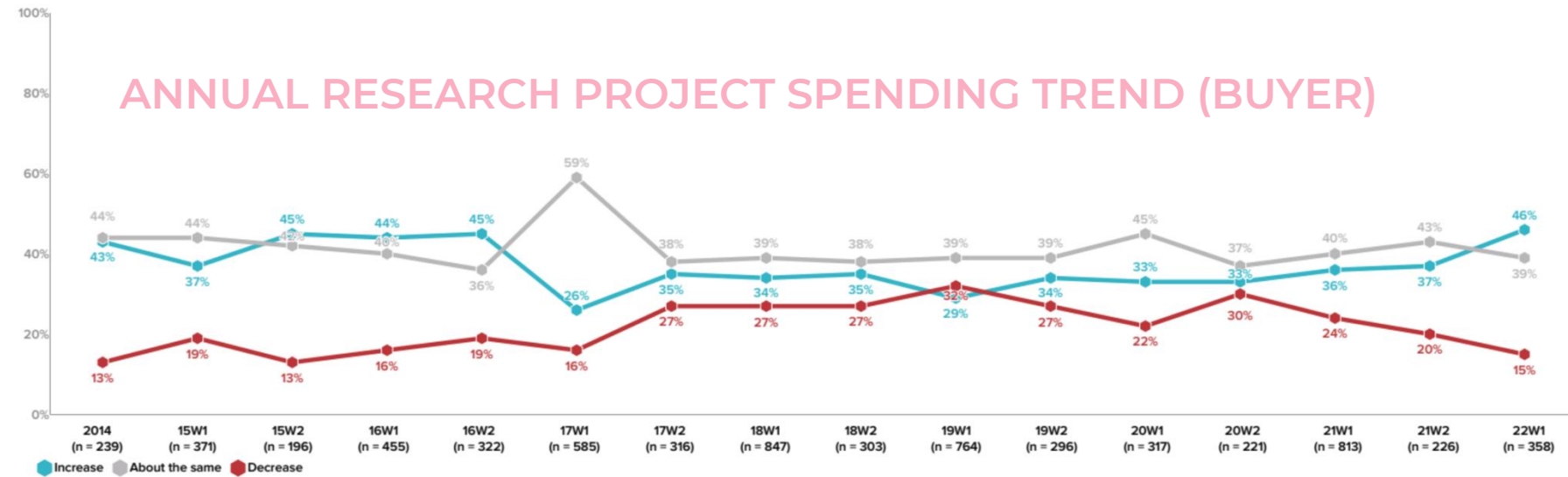


Herd mentality—examples of
Qualtrics, Medallia and Zappi has led
to the search for the next unicorn



Insights (MR and analytics) now seen
as a “sexy” sector in which to play

Positive Buyer Trends



BUYER RESEARCH PROJECT SPENDING IS THE HIGHEST SINCE 2019

BUYER OPTIMISM!

Buyer Optimism About Industry – 85% Very Optimistic or Optimistic

20W1 Before March 11 (n = 41)



20W1 After March 11 (n = 83)



20W2 (n = 267)



21W1 (n = 873)



21W2 (n = 254)



22W1 (n = 387)



Very Optimistic Optimistic Neutral Pessimistic Very Pessimistic

TOP TIPS FOR RIDING THIS NEWEST ROLLERCOASTER

SPECIALIZATION... NOT JUST FOR INSECTS

	2019	2020	2021	2022 (est)
Generalists	73%	65%	62%	56%
Specialists	27%	35%	38%	44%

WHEN
OTHERS
GO QUIET,
GO LOUD.





GET PERSONAL

PRACTICE CUSTOMER “LOVE”





LEARN TO LET GO

**“The only constant in life is
CHANGE”** – Heraclitus

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