



What is the market research & insights industry?

A view from inside and outside the AAPOR community

Panel session

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80th Conference of the American Association for Public Opinion Research
St. Louis, MO, May 14 - 16, 2025

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Acknowledgments

Thanks to Esomar for allowing us to reproduce some numbers and charts from their Esomar Global Market Research 2024 report

Thanks to the Insights Association [Melanie Courtright, CEO] for allowing us to reproduce some numbers and charts from their Annual U.S. Insights and Analytics Industry Report 2024

Insights industry view as defined by the Insights Association



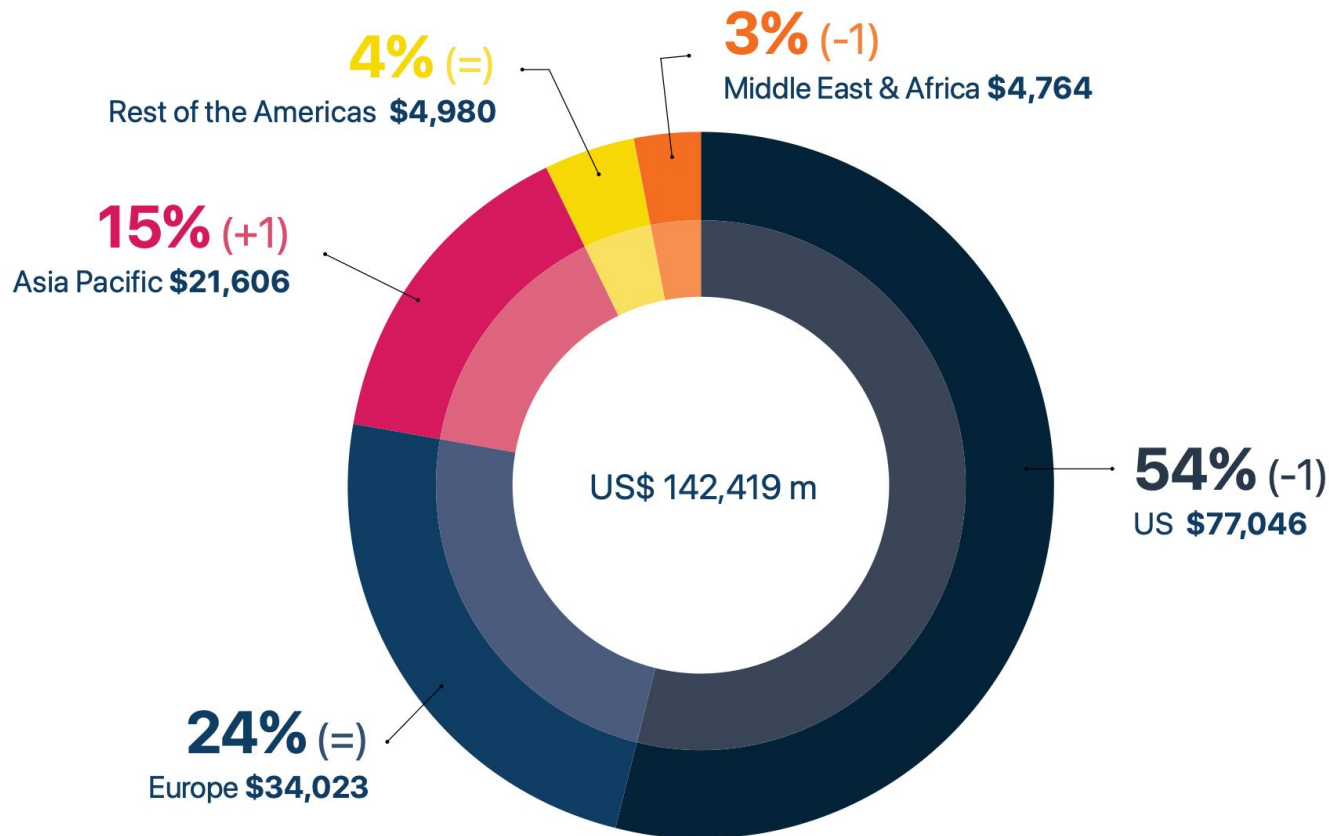
The insights industry is composed by three sectors:

Traditional Market research: composed by established market research firms, sample panel providers, and industry report & research

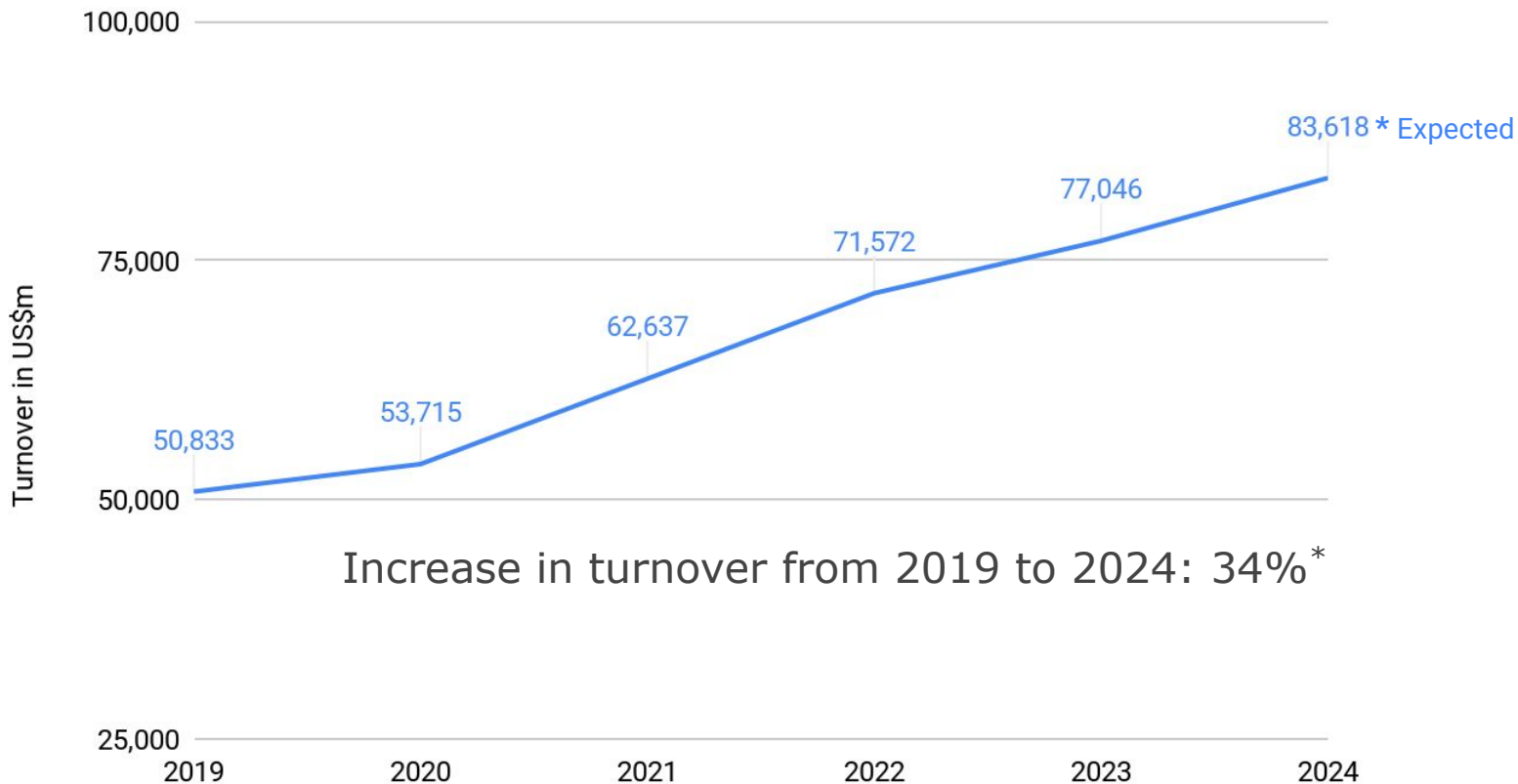
ResTech: composed by digital data analytics, social listening and communities, self-serve research platforms & enterprise feedback management (EFM) firms

Other: composed by consulting firms

2023 Global insights turnover by regions



U.S. Insights industry turnover in US\$m 2019-2024

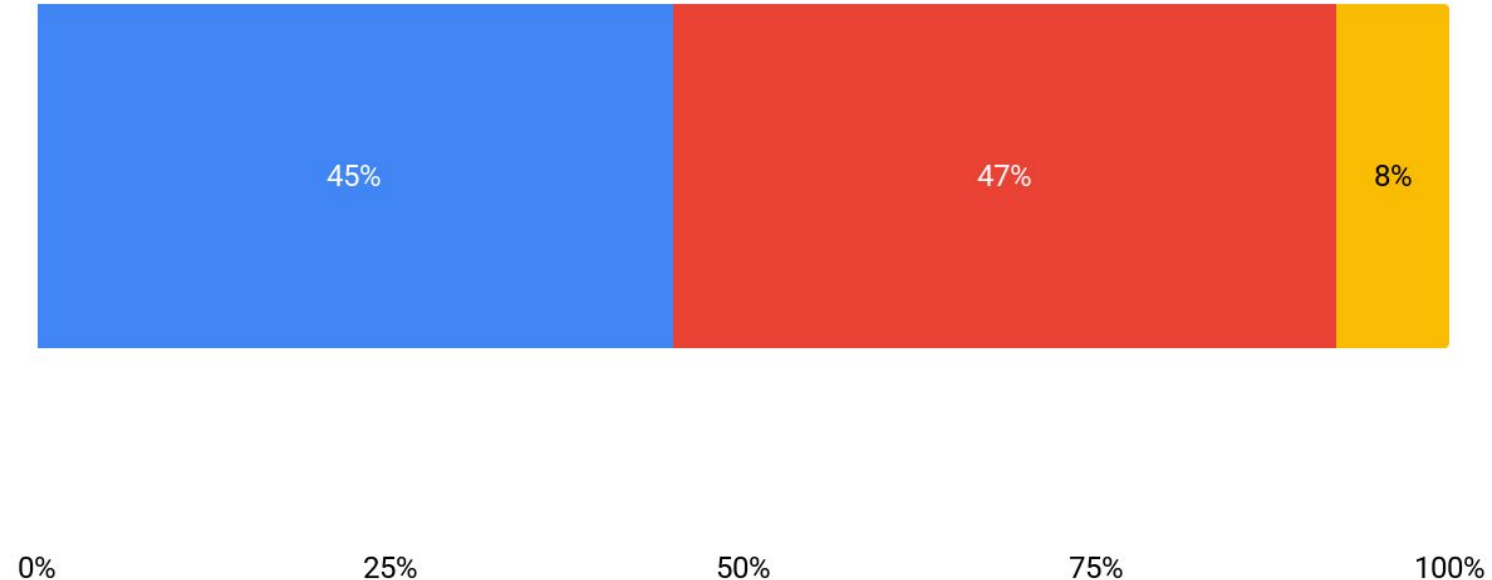


Data from figure 1 (Insights Association 2024, p. 2) & table 9.1.2 for the 2024 expected turnover (ESOMAR, 2024, p. 128)

* Inflation adjusted, base year: 2024. <https://www.usinflationcalculator.com/>

2023 U.S. composition of turnover by sector

■ Traditional Market Research ■ ResTech ■ Other (Consultancy)



2023 U.S. breakdown for Traditional Market Research

■ Established Market Research ■ Sample Panel Providers ■ Industry Reports & Research



0%

25%

50%

75%

100%

2023 U.S. breakdown for ResTech

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



0%

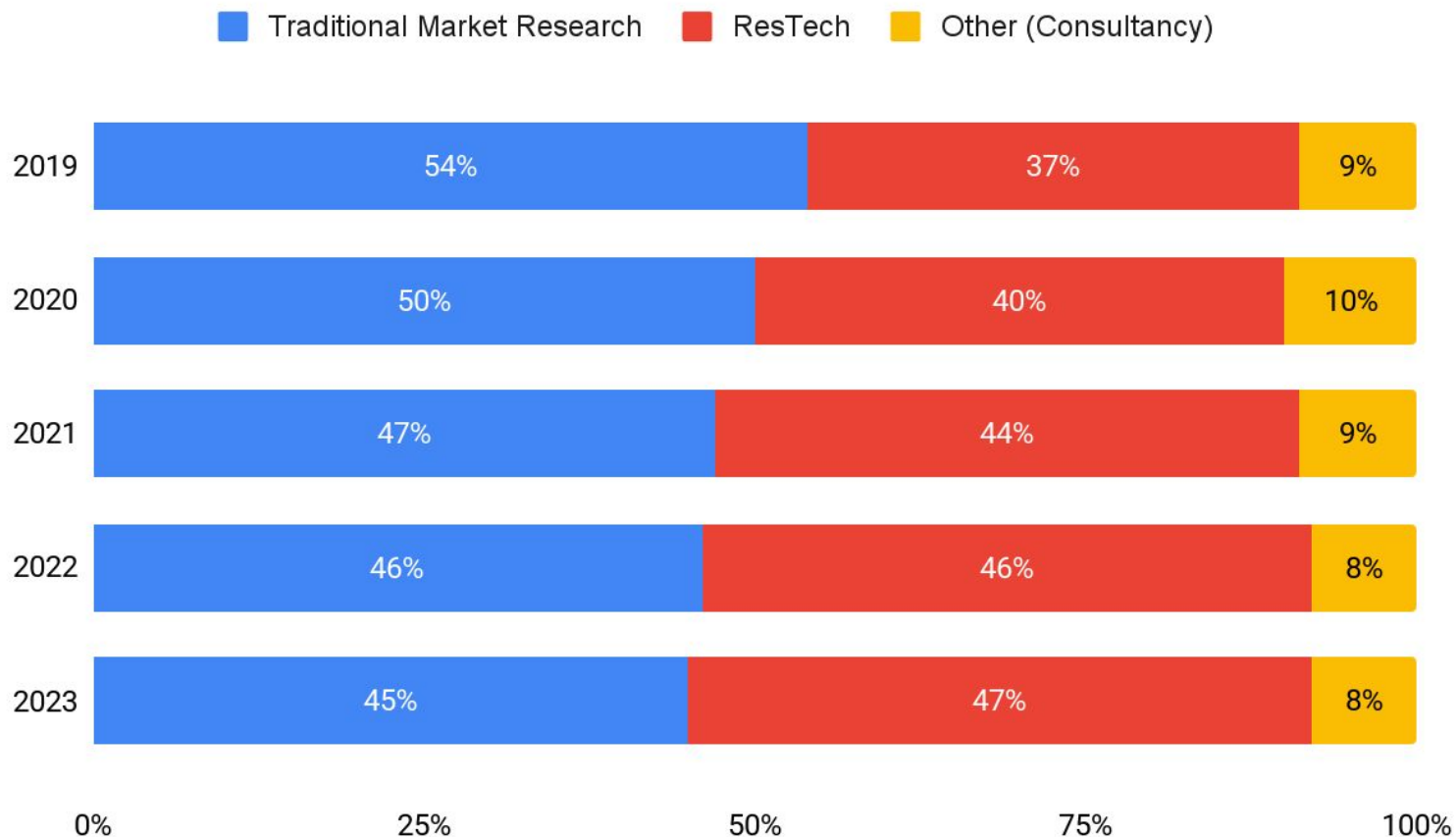
25%

50%

75%

100%

Trends in U.S. composition of turnover by sector 2019-2023



What methodologies are companies commissioning market research asking for?



Methodology	% Use
Online surveys	96%
Online qual with webcams	73%
Proprietary panels from external suppliers	69%
In-person qual	69%
Mobile first surveys	69%
Data integration	63%
Mobile surveys (NOT mobile first)	62%
Face-to-face interviews	60%
Attribution analytics/single source data	58%

Insights associations based in the U.S. or with a U.S. presence

(click on each logo to access the association's page)



Qualitative Research
Consultants Association

References

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- Greenbook. (2025). *2024 GRIT insights practice report*. Greenbook. <https://www.greenbook.org/grit/insights-practice-edition>
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AAPOR 80th Annual Conference

**Reshaping Democracy's Oracle:
Transforming Polls, Surveys, and
the Measurement of Public
Opinion in the Age of AI**

**May 14 - 16, 2025
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Appendix

Insights Association definition of Traditional Market research

Traditional Market research: composed by

1. *Established market research firms*: “This includes the time-honored, full-service research firms that have led the industry for decades including Nielsen, Kantar, Ipsos and GfK. It’s important to note that there were some changes in categorization made in this year’s report versus last year’s which impacted overall segment size”
2. *Sample panel providers*: “This includes companies that drive revenue solely from the maintenance or building of panels or that have a significant revenue stream associated with underlying panel capabilities. This also includes companies whose original primary source of revenue was tied to sample or panel. This segment includes Dynata, CINT, SSRS and others.
3. *Industry report & research*: “This includes firms that provide specialized research, data, advisory and/or consulting to specific roles and industries. Gartner, HIS Markit and IDC are a few of the companies in this segment”

Insights Association definition of ResTech

ResTech composed by:

1. *Digital data analytics*: "This segment captures the accelerated adoption of enterprise tools collecting data across the business. This segment highlights the expansion of analytics in the MarTech space and includes companies like Adobe, Salesforce, and Oracle."
2. *Social listening and communities*: "This segment blends companies (tools and services) that offer traditional and non-traditional on and offline customer communities with tools analysing social data. It also includes companies that have social or community revenue streams or a community-related offering, even if it looks different than the traditional definition of a community offering. It includes companies like Cision, Sprinklr and Meltwater Group..."
3. *Self-serve research platforms*: "This includes companies with revenue tied to do-it-yourself research functionality. Traditional survey platform companies like Qualtrics and SurveyMonkey are classified in this group because, although they've expanded functionality and added some services, their original revenue source was the survey platform offering."
4. *Enterprise feedback management (EFM) firms*: "This segment captures tools and offerings that focus on combining data from various sources (established research and naturally occurring data) to garner feedback from customers. It includes companies like Medallia, Verint and InMoment."

Insights Association definition of Other

Other composed by:

1. *Consulting firms*: “This segment acknowledges the blurring of strategy consulting firms into the research and insights industry. While it is not possible to isolate the actual turnover associated with research, data and insights within a consulting firm, the turnover represented here approximates research-related dollars and the methodology used to reach the approximation is covered in the Consulting Firms segment. This segment includes traditional management consulting firms like McKinsey, Accenture and BCG.”

ESOMAR detailed definitions of sectors

(note that it is different from the Insights Association's definitions)

Market research sector: Companies and agencies with a focus on project-based research, 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 includes sample providers, and data providers. Examples of market research firms include Nielsen, Kantar and Ipsos. Examples of sample 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 firm, 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 includes Salesforce, Adobe, and NICE Systems. Examples of social listening and communities include Cision AB, Spinklr, and Meltwater Group. Examples of self-serve research platforms include Qualtrics, SurveyMonkey and Alida. Examples of enterprise feedback management include Medallia, Forsta, and inMoment.

Reporting sector: Includes consultancy and industry reporting firms. Examples of consulting firms research companies include Deloitte, McKinsey & Co., and Booz Allen Hamilton. Examples of industry reports companies include Garner, CoStar, and IHS Markit. (Esomar, 2024, p. 194)



Thank you

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