

June 2015 1st Annual Report



A unique look at the companies that dominate our industry

INSIDE: First ever “Top 10 Big Data Companies” – See page 7

During our 21 years informing the research industry of news that matters, I was often asked why RFL Communications did not publish a Top 50 Research Company list. My answer was always, “Larry (Gold) is already doing that. Why duplicate his work?”

But over the years, I came to see the research industry as much more than research agencies and the industry took on many new dimensions, like analytics, CRM, social media, etc.

Which has led us to innovate, as we’ve done many times before, and introduce our inau-

Top 50” include the industry’s well-known major research agencies, plus a few never before seen on a research agency list (e.g, Omnicom, which includes Communispace, plus M/A/R/C, Hall and Partners and several small agencies).

But it also includes some of the research industry’s largest and, therefore, most important research suppliers, without which research projects would waste time navigating details. And then there is IBM, which has been an invisible research entity but plays an essential industry role as the owner of SPSS, Cognos and Watson.



gural ranking of the “**RFL Global Top 50 Research Organizations.**”

“Global” because a great deal of reported U.S. research revenue is from projects executed outside the U.S. Thus, “Global” is a more accurate, company-to-company comparison.

RFL’s Top 50 has an approximate \$50 million floor, a notable number with heft.

Additionally, there is one most prominent distinction between this list and others.

“Research Organizations” in RFL’s “**Global**

Finally, RFL’s “**Global Top 50 Research Organizations**” includes new, dynamic, unorthodox research businesses. Traditional research businesses say they (e.g., InMoment) have been stealing chunks of business. Plus, Acxiom and Harte-Hanks belong because their direct marketing and targeting offerings are growing research complements.

This is a different and better way to view companies that are research difference makers. But, what do you think? Email RFLBob@Gmail.com.

RFL 2014 Global Top 50 Research Organizations



Rank	Company	Headquarters Website	2014 Global Revenues (\$Mil)	Percentage Change
1	Nielsen	London, UK/New York, NY Nielsen.com	\$6,288.0	+ 4.0%
2	Kantar ⁽¹⁾	London, UK Kantar.com	\$4,002.5 ⁽²⁾	+ 0.3%
3	IBM ⁽³⁾	Armonk, NY IBM.com	\$3,000.0 ⁽⁴⁾	NA
4	IMS Health	Norwalk, CT IMSHealth.com	\$2,641.0	+ 3.8%
5	Ipsos S.A.	Paris, France Ipsos.com	\$2,037.6 ⁽⁵⁾	- 2.5%
6	GfK	Nuremberg, Germany GfK.com	\$1,452.9 ⁽⁵⁾	- 2.8%
7	Gartner ⁽⁶⁾	Stamford, CT Gartner.com	\$1,445.3	+ 13.7%
8	Information Resources, Inc.	Chicago, IL IRIWorldwide.com	\$ 986.0	+ 10.0%
9	Acxiom Corp. ⁽⁷⁾	Little Rock, AR Acxiom.com	\$ 808.9 ⁽⁸⁾	+ 2.0%
10	Harte-Hanks Marketing	San Antonio, TX HarteHanks.com	\$ 553.7	- 1.1%

1 - "Data Investment Management" 2 - GBD 2014 average exchange rate: £ = \$1.64761
 3 - "Information & Analytics Group" 4 - Estimate from Dan Vesset, IDC
 5 - 2014 average exchange rate: € = \$1.32925 6 - Research division
 7 - "Marketing & Data Services" division 8 - Jan-Dec revenues, although Acxiom fiscal is April-March

RFL 2014 Global Top 50 Research Organizations



Rank	Company	Headquarters Website	2014 Global Revenues (\$Mil)	Percentage Change
11	Cegecim ⁽⁹⁾	Boulogne-Billancourt, France Cegecim.com	\$524.6 ⁽⁵⁾	+0.9%
12	Westat, Inc.	Rockville, MD Westat.com	\$517.4	-11.2%
13	Dunnhumby	London, UK Dunnhumby.com	\$481.4	+4.2%
14	Tableau Software	Seattle, WA Tableau.com	\$412.6	+78.0%
15	Wood Mackenzie	Edinburgh, UK WoodMac.com	\$374.0 ⁽²⁾	+ 3.7%
16	Intage Holdings Inc ⁽¹⁰⁾	Tokyo, Japan IntageHoldings.co.jp	\$336.6 ^(11,14)	+12.3%
17	comScore	Reston, VA Comscore.com	\$325.2	+13.3%
18	Verisk Analytics ⁽¹²⁾	Jersey City, NJ Verisk.com	\$315.6	+16.2%
19	Confirmit	Oslo, Norway Confirmit.com	\$305.0 ⁽¹⁹⁾	NA
20	Omnicom	New York, NY Omnicomgroup.com	\$295.0 ⁽¹⁹⁾	NA

2 - GBD 2014 average exchange rate: £ = \$1.64761 5 - 2014 average exchange rate: € = \$1.32925
 9 - "CRM & Strategic Data" division 10- "Market Research & Consulting" division
 11 - JPY 2014 exchange rate: Yen = \$.0098 12 - "Healthcare" division
 14 - Revenue for Fiscal Yr ended 3-31-2015 19 - RFL estimate

RFL 2014 Global Top 50 Research Organizations



Rank	Company	Headquarters Website	2014 Global Revenues (\$Mil)	Percentage Change
21	NPD Group	Port Washington, NY NPD.com	\$ 292.1	+7.8%
22	J.D. Power and Associates	Westlake Village, CA JDPower.com	\$ 287.0	+11.0%
23	Mediametrie	Levallois, il-de-France Mediametrie.com	\$ 238.1 (5)	+12.0%
24	Macromill	Konan, Minato-Ku, Japan Macromill.com	\$ 216.0 (13)	+16.9%
25	ICF International	Fairfax, VA ICFI.com	\$ 213.2	- 5.5%
26	Forrester (17) Research	Cambridge, MA Forrester.com	\$ 207.5	+ 2.3%
27	Video Research, Ltd.	Tokyo, Japan Videor.co.jp	\$ 195.1 (11,15)	- 0.3%
28	MaritzCX	Fenton, MO MaritzResearch.com	\$ 174.0	- 2.0%
29	Decision Resources Grp	Burlington, MA DecisionResources.com	\$ 163.0	+ 8.5%
30	Twitter (20)	San Francisco, CA Twitter.com	\$ 147.1	NA

5 - 2014 average exchange rate: € = \$1.32925
 13 - Macromill's own conversion rate \$0.0086 per JPY
 17 - "Research Services" division
 20 - Twitter "Data Licensing" revenues

11 -JPY 2014 exchange rate: Yen = \$.0098
 15 -Revenue for Fiscal Yr ended 3-31-2014
 19 - RFL estimate

RFL 2014 Global Top 50 Research Organizations



Rank	Company	Headquarters Website	2014 Global Revenues (\$Mil)	Percentage Change
31	Abt SRBI Inc.	New York, NY SRBI.com	\$ 139.1	-19.5
32	Qualtrics	Provo, UT Qualtrics.com	\$ 135.0 (19)	NA
33	ORC Int'l.	Princeton, NJ ORCInternational.com	\$ 126.1	+3.4%
34	YouGov	London, UK YouGov.com	\$ 116.2 (2)	+14.6%
35	Lieberman Research WW	Los Angeles, CA LRWonline.com	\$ 113.5	+13.2%
36	BVA	Tillé, France BVA.fr	\$ 111.1 (5)	+28.2%
37	Cello (18) Group	London, UK CelloGroup.com	\$ 104.1 (2,19)	NA
38	National Research Corp.	Lincoln, NE NationalResearch.com	\$ 98.8	+6.7%
39	Rentrak Corp.	Portland, OR Rentrak.com	\$ 96.2	+40.0%
40	Vision Critical	Vancouver, Canada VisionCritical.com	\$ 95.7 (16)	+15.8%

2 - GBD 2014 avg exchange rate: £ = \$1.64761
 16 - CAD 2014 avg exchange rate
 19 - RFL estimate

5 - 2014 avg exchange rate: € = \$1.32925
 18 - Cello Health & Signal "Research Revenues"

RFL 2014 Global Top 50 Research Organizations



Rank	Company	Headquarters Website	2014 Global Revenues (\$Mil)	Percentage Change
41	Market Strategies Int'l.	Livonia, MI MarketStrategies.com	\$ 70.0	+5.2%
42	Perception Rsch Services	Teaneck, NJ PRSresearch.com	\$ 65.2	+16.9%
43	FocusVision	Stamford, CT FocusVision.com	\$ 64.9	NA
44	MV2 Group	Paris, France MV2Group.com	\$ 64.0 (5)	+1.6%
45	AlphaImpactRx	Horsham, PA AlphaImpactRx.com	\$ 62.0	+2.8%
46	Burke Inc.	Cincinnati, OH Burke.com	\$ 60.5	-1.6%
47	Morpace Inc.	Farmington Hills, MI Morpace.com	\$ 58.1	+9.2%
48	InMoment	Salt Lake City, UT InMoment.com	\$ 45.9	+49.0%
49	Service Management Grp	Kansas City, MO SMG.com	\$ 45.4	+24.0%
50	Market Probe, Inc.	Milwaukee, WI MarketProbe.com	\$ 44.9	+0.5%

5 - 2014 avg exchange rate: € = \$1.32925

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RFL 2014 Global Top 10 Big Data/ Analytics Insight Organizations*



Rank	Company	Headquarters Website	2014 Global Revenues (\$Mil)	Percentage Change
1	IBM Corp.	Armonk, NY IBM.com	\$1,601.0	+ 16.9%
2	Hewlett-Packard	Palo Alto, CA HP.com	\$ 932.0	+ 7.2%
3	SAP SE	Weinheim, Germany SAP.com	\$ 923.0	+ 69.4%
4	Teradata Corp.	Dayton, OH Teradata.com	\$ 687.0	+ 32.6%
5	Dell Inc.	Round Rock, TX Dell.com	\$ 685.0	+ 21.9%
6	Palantir	Abu Dhabi, UAE Palantir.com	\$ 544.0	+ 30.1%
7	SAS Institute	Cary, NC SAS.com	\$ 533.0	+ 11.0%
8	Microsoft	Redmond, WA Microsoft.com	\$ 532.0	NA
9	Accenture	Dublin, Ireland Accenture.com	\$ 498.0	+ 20.0%
10	Oracle Corp.	Redwood City, CA Oracle.com	\$ 493.0	+ 0.4%

Source: Wikibon Premium • Copyright Wikibon Premium, 2015 (More Big Data insights at Wikibon.org)

After more than 40 years, it is no longer sufficient to consider just the impact of traditional research providers. “Big Data/Analytics Insights Organizations” are the “New, Other Insights Providers” increasingly relied upon by client users of market research for business insights from transactional and other Big Data. The companies on this Top 10 list are described as the “crossover between data analytics and market research.”

RFL COMMUNICATIONS, INC.

MARKET RESEARCH'S PLACE FOR BUSINESS - FOCUSED NEWS, INSIGHTS AND COMMENTARY SINCE 1995

RFL Communications is best recognized as market research news, knowledge, insights and commentary provider from four newsletters and the only daily research news video report.

The creation of those news media was a lend of innovation, thought leadership and advocacy.

The research industry had no formal recognition of the impact of new technologies and methodologies until **Research Business Report**. No difference-making research conference speeches were summarized before **Research Conference Report**. Even our competitors saluted **Research Department Report** client profiles. And only **Pharma Market Research Report** covers market research in the pharmaceutical, health care, biotech and medical device industries.

The newsletters turned industry attention to Online Research (1996), Online Communities (2001) and Mobile Research (2003) years ahead of their market adoption.

In 2006, RFL Communications matured and saw industry problems as elements with meaning beyond reporting assignments. We made the conscious deci-

sion to not just report but advocate for sensible industry changes that boosted capabilities and research's overall standing.

Thus, we staged groundbreaking conferences to address Respondent Cooperation (2006) and Online Data Quality (2007 - 2010). The latter was part of RFL's centerpiece accomplishment, an industry push to drive online data quality that induced the leading industry associations to tackle the troublesome situation. Included in that effort was

"Platforms for Data Quality Progress," a booklet guiding improved online research results.

The **RFL Global Top 50 Research Organizations** is another new thought leadership statement.

This summer, look for the **RFL Market Research Toolbox Report**, to educate researchers about optimum situations for each of 50-plus tools & techniques.

You are invited to lend your expertise for as many of the categories at RFLOnline.com. Look for and click

on the Toolbox artwork, download and fill out our Toolbox Form and send us your inputs. Help us make all types of research better and more reliable.



RFL Communications, Inc., the foremost provider of news and information for market researchers since 1995, publishes four MR newsletters and produces a Daily Research News Video.

Research Business Report (RBR) covers new technologies & methodologies that are changing economics and other aspects of MR.

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Research Department Report (RDR) profiles leading MRDs, focusing on small differences between MRDs that have major impacts.

Pharma Market Research Report (PMR²) is the only source for pharmaco, healthcare and medical device MR news and information.

Ask RFL for a free copy of **RBR**, **RCR**, **RDR** and/or **PMR²**.

Research Business DAILY Report (RBDR) is the MR industry's Only Daily Research News Video. [Youtube.com/User/RBDRChannel]

RFL was the 2013 recipient of NGMR's Individual Achievement award for "Disruptive MR Innovation" crediting **Research Business DAILY Report**, our daily news video (visit rflonline.com & YouTube.com).

RFL Publisher, Editor & Producer Bob Lederer was one of *Survey Magazine's* September 2014 "20 Researchers You Need to Know."

RFL Communications, Inc. offers access to our proprietary 10,500-name list of client market researchers. It is updated daily and RFL is making it available for rental or purchase. Call (847) 673-6288 or email Linda Tresley (Info@RFLOnline.com) about how you can use the list to contact top client-side market research buyers in the U.S.

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