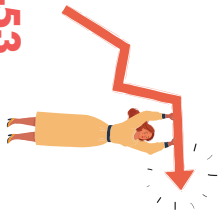


tekst: Jan Roelkens, hoofdredacteur Daily Data Byes

ONDERZOEKSRANCHE HOUDT GELOOF IN DE TOEKOMST

VEERKRACHT TEGEN DE CORONADIP

Voor veel branches is 2020 een jaar dat ze het liefst overslaan. Nogal wat bedrijven hebben de grootste moeite om overleefd te blijven en aan vooruitkijken komen ze nog niet echt toe. Hoe zit dat bij de onderzoeksbranche? Beter dan je denkt, als je naar de cijfers kijkt. Ja, een coronadip is er zeker, maar de tegenvallers zijn te overzien en het geloof in de toekomst is er niet minder om.



TOP-53 OP BASIS VAN AANTAL FTE

| TOP-53<br>OP BASIS VAN AANTAL FTE |                                          |  |                         |                                               |                                            |                                       |                                                      |       |                            |                                                 |                             |            |                                        |                           |                                             |                                          |                                             |        |                                                      |                                                    |                            |                     |             |              |                                               |                        |                         |                                       |                                            |
|-----------------------------------|------------------------------------------|-----------------------------------------------------------------------------------|-------------------------|-----------------------------------------------|--------------------------------------------|---------------------------------------|------------------------------------------------------|-------|----------------------------|-------------------------------------------------|-----------------------------|------------|----------------------------------------|---------------------------|---------------------------------------------|------------------------------------------|---------------------------------------------|--------|------------------------------------------------------|----------------------------------------------------|----------------------------|---------------------|-------------|--------------|-----------------------------------------------|------------------------|-------------------------|---------------------------------------|--------------------------------------------|
|                                   |                                          |                                                                                   |                         |                                               |                                            |                                       |                                                      |       |                            |                                                 |                             |            |                                        |                           |                                             |                                          |                                             |        |                                                      |                                                    |                            |                     |             |              |                                               |                        |                         |                                       |                                            |
|                                   |                                          | TOTAL FTE                                                                         | TURNOVER                | Brand-/positioning-/lifestyle-/image-research | Communication/concepttesting/advertisement | Customer and/or employee satisfaction | Product development-/usage- and behavioural-research | Other | Fast moving consumer goods | Durables & electronics(non-food consumer goods) | Pharmaceutical & Healthcare | Automotive | Financials (Bank en verzekeringswezen) | ICT/telecom/internet/mail | Advertising (Media/reclame en communicatie) | Utilities (nutsbedrijven - geen telecom) | Public sector (Overheid/Onderwijs/educatie) | Retail | Transport & Leisure (Vervoer/vrije tijd en toerisme) | other services (overige zakelijke dienstverlening) | other Business to Business | other customer type | Qualitative | Quantitative | Other then Qualitative/Quantitative/Secondary | Active data collection | Passive data collection | Turnover invoiced to national clients | Turnover invoiced to international clients |
| 1                                 | GfK Netherlands                          | 286                                                                               | 25.000.001 - 50.000.000 | 0                                             | 6                                          | 7                                     | 45                                                   | 42    | 8                          | 9                                               | 0                           | 1          | 4                                      | 0                         | 30                                          | 2                                        | 5                                           | 0      | 0                                                    | 5                                                  | 12                         | 23                  | 1           | 24           | 75                                            | 70                     | 25                      | 85                                    | 15                                         |
| 2                                 | Kantar Netherlands                       | 167                                                                               | 25.000.001 - 50.000.000 | 43                                            | 7                                          | 14                                    | 10                                                   | 26    | 37                         | 6                                               | 1                           | 5          | 5                                      | 3                         | 5                                           | 1                                        | 19                                          | 2      | 1                                                    | 6                                                  | 4                          | 5                   | 9           | 91           | 0                                             | 90                     | 10                      | 68                                    | 32                                         |
| 3                                 | Ipsos                                    | 137                                                                               | 15.000.001 - 20.000.000 | 30                                            | 14                                         | 15                                    | 21                                                   | 20    | 14                         | 8                                               | 9                           | 1          | 14                                     | 0                         | 0                                           | 2                                        | 5                                           | 0      | 5                                                    | 12                                                 | 30                         | 0                   | 21          | 74           | 0                                             | 100                    | 0                       | 70                                    | 30                                         |
| 4                                 | MetricLab                                | 95                                                                                | 10.000.001 - 15.000.000 | 25                                            | 35                                         | 10                                    | 25                                                   | 5     | 30                         | 20                                              | 5                           | 5          | 10                                     | 5                         | 5                                           | 5                                        | 5                                           | 5      | 5                                                    | 0                                                  | 0                          | 0                   | 3           | 97           | 0                                             | 90                     | 5                       | 20                                    | 80                                         |
| 5                                 | Markteffect                              | 91                                                                                | 7.500.001 - 10.000.000  | 70                                            | 5                                          | 15                                    | 10                                                   | 0     | 25                         | 5                                               | 10                          | 0          | 10                                     | 5                         | 15                                          | 5                                        | 15                                          | 0      | 10                                                   | 0                                                  | 0                          | 0                   | 15          | 85           | 0                                             | 80                     | 18                      | 98                                    | 2                                          |
| 6                                 | Motivation International                 | 90                                                                                | 10.000.001 - 15.000.000 | 17                                            | 14                                         | 6                                     | 7                                                    | 56    | 6                          | 3                                               | 1                           | 2          | 18                                     | 9                         | 10                                          | 8                                        | 25                                          | 7      | 8                                                    | 2                                                  | 1                          | 0                   | 19          | 72           | 6                                             | 93                     | 5                       | 96                                    | 4                                          |
| 7                                 | DVJ Research Group                       | 62                                                                                | 7.500.001 - 10.000.000  | 40                                            | 30                                         | 5                                     | 25                                                   | 0     | 15                         | 15                                              | 5                           | 0          | 15                                     | 10                        | 0                                           | 0                                        | 20                                          | 10     | 5                                                    | 0                                                  | 5                          | 0                   | 0           | 100          | 0                                             | 90                     | 5                       | 60                                    | 40                                         |
| 8                                 | I&O Research                             | 59                                                                                | 7.500.001 - 10.000.000  | 25                                            | 25                                         | 25                                    | 0                                                    | 0     | 0                          | 1                                               | 0                           | 0          | 0                                      | 0                         | 0                                           | 10                                       | 85                                          | 1      | 2                                                    | 0                                                  | 1                          | 0                   | 15          | 75           | 0                                             | 95                     | 3                       | 100                                   | 0                                          |
| 9                                 | Blauw Research                           | 56                                                                                | 5.000.001 - 7.500.000   | 20                                            | 20                                         | 20                                    | 40                                                   | 0     | 25                         | 5                                               | 0                           | 0          | 10                                     | 15                        | 0                                           | 5                                        | 10                                          | 10     | 0                                                    | 0                                                  | 5                          | 15                  | 15          | 83           | 0                                             | 95                     | 0                       | 80                                    | 20                                         |
| 10                                | Normec Sensory                           | 50                                                                                | 7.500.001 - 10.000.000  | 0                                             | 0                                          | 0                                     | 100                                                  | 0     | 100                        | 0                                               | 0                           | 0          | 0                                      | 0                         | 0                                           | 0                                        | 0                                           | 0      | 0                                                    | 0                                                  | 0                          | 0                   | 0           | 100          | 0                                             | 100                    | 0                       | 70                                    | 30                                         |
| 11                                | MMW2                                     | 50                                                                                | 5.000.001 - 7.500.000   | 10                                            | 20                                         | 50                                    | 10                                                   | 10    | 5                          | 0                                               | 0                           | 0          | 30                                     | 10                        | 0                                           | 0                                        | 35                                          | 10     | 10                                                   | 0                                                  | 0                          | 0                   | 20          | 80           | 0                                             | 80                     | 20                      | 95                                    | 5                                          |
| 12                                | Skim                                     | 50                                                                                | 7.500.001 - 10.000.000  | 20                                            | 30                                         | 0                                     | 30                                                   | 20    | 50                         | 10                                              | 20                          | 5          | 5                                      | 5                         | 0                                           | 0                                        | 0                                           | 0      | 5                                                    | 0                                                  | 0                          | 0                   | 20          | 75           | 0                                             | 90                     | 5                       | 10                                    | 90                                         |
| 13                                | MeMet2                                   | 47                                                                                | 5.000.001 - 7.500.000   | 0                                             | 0                                          | 0                                     | 0                                                    | 0     | 0                          | 0                                               | 0                           | 0          | 0                                      | 0                         | 0                                           | 0                                        | 0                                           | 0      | 0                                                    | 0                                                  | 0                          | 100                 | 0           | 0            | 100                                           | 0                      | 0                       | 0                                     |                                            |
| 14                                | Onderzoek, informatie en Statistiek      | 44                                                                                | 5.000.001 - 7.500.000   | 0                                             | 0                                          | 0                                     | 0                                                    | 0     | 0                          | 0                                               | 0                           | 0          | 0                                      | 0                         | 0                                           | 0                                        | 0                                           | 0      | 0                                                    | 0                                                  | 0                          | 100                 | 0           | 0            | 100                                           | 0                      | 0                       | 0                                     |                                            |
| 15                                | Epiphany - Research Based Consultancy    | 41                                                                                | 5.000.001 - 7.500.000   | 35                                            | 0                                          | 0                                     | 65                                                   | 0     | 20                         | 0                                               | 10                          | 0          | 40                                     | 15                        | 0                                           | 5                                        | 0                                           | 10     | 0                                                    | 0                                                  | 0                          | 0                   | 20          | 80           | 0                                             | 55                     | 15                      | 10                                    | 90                                         |
| 16                                | IDVIA Solutions                          | 40                                                                                | 5.000.001 - 7.500.000   | 0                                             | 0                                          | 0                                     | 0                                                    | 0     | 0                          | 0                                               | 0                           | 0          | 0                                      | 0                         | 0                                           | 0                                        | 0                                           | 0      | 0                                                    | 0                                                  | 0                          | 80                  | 20          | 0            | 100                                           | 0                      | 0                       | 0                                     |                                            |
| 17                                | MarketResponse                           | 38                                                                                | 5.000.001 - 7.500.000   | 15                                            | 15                                         | 54                                    | 16                                                   | 0     | 7                          | 2                                               | 10                          | 1          | 18                                     | 1                         | 3                                           | 5                                        | 18                                          | 7      | 7                                                    | 16                                                 | 3                          | 2                   | 7           | 81           | 2                                             | 73                     | 25                      | 99                                    | 1                                          |
| 18                                | USP Marketing Consultancy                | 33                                                                                | 4.000.001 - 5.000.000   | 20                                            | 15                                         | 25                                    | 15                                                   | 0     | 85                         | 0                                               | 0                           | 0          | 0                                      | 0                         | 0                                           | 0                                        | 15                                          | 0      | 0                                                    | 0                                                  | 0                          | 0                   | 30          | 65           | 0                                             | 90                     | 0                       | 45                                    | 55                                         |
| 19                                | Validators                               | 33                                                                                | 3.000.001 - 4.000.000   | 45                                            | 45                                         | 0                                     | 10                                                   | 0     | 15                         | 10                                              | 0                           | 15         | 16                                     | 12                        | 10                                          | 7                                        | 5                                           | 5      | 5                                                    | 0                                                  | 0                          | 0                   | 5           | 90           | 0                                             | 35                     | 35                      | 70                                    | 30                                         |
| 20                                | Mobiel Centre Marktonderzoek, veldwerk+. | 25                                                                                | 3.000.001 - 4.000.000   | 0                                             | 0                                          | 0                                     | 0                                                    | 0     | 0                          | 0                                               | 0                           | 0          | 0                                      | 0                         | 0                                           | 0                                        | 0                                           | 0      | 0                                                    | 0                                                  | 0                          | 90                  | 10          | 0            | 100                                           | 0                      | 0                       | 0                                     |                                            |
| 21                                | Deaan Research Solutions                 | 25                                                                                | 4.000.001 - 5.000.000   | 15                                            | 10                                         | 40                                    | 15                                                   | 20    | 5                          | 0                                               | 0                           | 5          | 0                                      | 0                         | 0                                           | 5                                        | 63                                          | 5      | 2                                                    | 5                                                  | 5                          | 0                   | 0           | 0            | 100                                           | 0                      | 97                      | 3                                     |                                            |

De overzichten op deze pagina's zijn allemaal gebaseerd op het aantal FTE's bij de onderzoeksbureaus. Naast het algemene overzicht van FTE's zijn tien branche-overzichten opgenomen. De top-50 is dit jaar een top-53 geworden, zodat in het staartrij nog een paar bureaus konden meedoen met een gelijk aantal FTE's. De top-10 laat geen al te grote veranderingen zien in ranking. GfK staat evenals vorige jaren bovenaan, zij het met een kleine terugval. FTE-stijgers zijn Markteffect en de DVJ Research Group (nieuw in de top-10). De andere bureaus bleven stabiel of zakten iets in FTE's.

Genmiddeld genomen daakt de omzet per FTE van 142.000 euro in 2019 naar 136.000 euro in 2020. De bureaus maken verder een schatting van hun omzet in 2020 in vergelijking met die van vorig jaar. Bij de grotere bureaus denkt 40% in dit jaar minder om te zetten, maar 50% verwacht een hogere omzet, en 10% een gelijk resultaat. Bij de middeldgrote bureaus ziet 24% meer omzet en zijn de cijfers voor mindere en stabiele omzet ongeveer gelijk. De kleine bureaus zien het wat somberder: 41% denkt minder omzet te draaien, 15% blijft stabiel en 30% verwacht een beter resultaat. Maar de 'concretists' toch wel de kop opsteekt, is bij de ZZP'ers: 55% zegt minder om te zetten, 15% is stabiel en 30% verwacht een verhoging.

Een voorzichtige conclusie is op zijn plaats dat vooral de ZZP'ers de happen oprangen en de bureaus er verhoudingsgewijs beter uitkomen.



**Meer online**

De bureaus hebben - net als andere bedrijven - hun activiteiten flink moeten aanpassen. Opdrachtgevers moesten snel schakelen of namen even pauze, iedereen ging thuis aan het werk, er waren veel minder fysieke ontmoetingen met respondenten en er was ook geen fysiek kwaliteitsonderzoek meer. Het heeft een behoorlijke weerslag gehad. Dat leidde ertoe dat veel werk nog verder naar online ver schoof, nog meer dan de tendens al was. Vooral in het kwalitatief onderzoek is dat het geval. Bureaus verwachten dat deze verandering zich gaat nestelen, zo bleek uit een

regelmatige rondvraag die we dit jaar voor Daily Data Byes - de nieuwe wekelijkse nieuwsschrief van de MOA - deden.

### Profiteren van inzicht

Al met al zorgde de coronatijd ervoor dat bureaus nieuwe methoden ontwikkelden om snel inzicht te geven in consument en markt. En gelukkig bleken er voldoende opdrachtgevers te zijn die niet bleven wachten, maar juist wilden profiteren van door bureaus ontwikkelde inzichten. Over het algemeen

### Optimisme

Wat gaat het worden in het nieuwe jaar? We vroegen de bureaus naar de verwachtingen voor de gehele markt, dus niet alleen voor het bureau zelf. Was de verwachting die ze een jaar geleden uitspreken al hoog - 62% zag meer omzet in 2020 - nu is het optimisme even groot, zelfs soms

## FLEXIBELE EN INVENTIEVE HOUDING

REDT

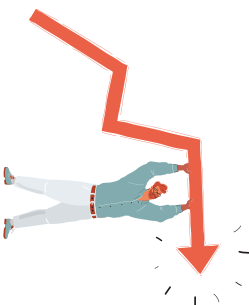
BUREAUS

nog iets hoger. De grote en middelgrote bureaus verwachten tussen 60 en 80% meer omzet in de totale markt. De kleine bureaus doen er niet veel voor onder met 55%. Alleen de ZZP'ers blijven het toech wat somber zien. Lagere, stabiele en hogere omzet scores daar elk eenderde.

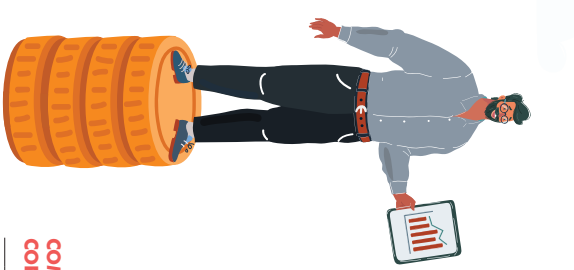
Conclusie: een iets minder jaar, hoewel de klappen over het algemeen meevallen. De toekomst moet uitwijzen hoe snel de branche corona achter zich laat, maar de bureaus hebben er vertrouwen in. Voor de gehele onderzoekbranche een goed teken.

### MOA

De wereld van marketinginsights, onderzoek en analytics is voortdurend in ontwikkeling. MOA biedt de expertise om organisaties te begeleiden naar een professioneel, toekomstbestendig data- en insightsmanagement. MOA bestrijkt het hele terrein van in kaart brengen van menselijk gedrag en behoeften, ongeacht de methode van dataverzameling en analyse. Het MOA Expertise Center is een betrouwbare en deskundig kennisplatform voor professionals die op dit terrein werkzaam zijn.



|  |    |                   |    |                       |                        |    |                                               |   |                                            |   |                                       |    |                                                      |    |       |    |                     |    |                                    |   |           |   |                                         |   |                               |   |                   |   |                        |   |         |   |                            |   |                        |   |                     |   |            |   |             |   |             |    |              |    |                                  |   |       |    |                        |   |                         |    |                                       |    |                                           |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |  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|--|----|-------------------|----|-----------------------|------------------------|----|-----------------------------------------------|---|--------------------------------------------|---|---------------------------------------|----|------------------------------------------------------|----|-------|----|---------------------|----|------------------------------------|---|-----------|---|-----------------------------------------|---|-------------------------------|---|-------------------|---|------------------------|---|---------|---|----------------------------|---|------------------------|---|---------------------|---|------------|---|-------------|---|-------------|----|--------------|----|----------------------------------|---|-------|----|------------------------|---|-------------------------|----|---------------------------------------|----|-------------------------------------------|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
|  | 22 | InStes Consulting | 23 | TOTAL FTE             | 7.500.001 - 10.000.000 | 34 | Brand-/positioning-/lifestyle-/image-research | 9 | Communication/concepttesting/advertisement | 1 | Customer and/or employee satisfaction | 45 | Product development-/usage- and behavioural-research | 11 | Other | 62 | Manufacturing + B2B | 35 | Financial services incl. insurance | 0 | Utilities | 0 | Public sector, Local/central government | 0 | Communication and advertising | 0 | Research agencies | 0 | Service industry other | 1 | Unknown | 0 | Fast moving consumer goods | 0 | Durables & electronics | 0 | Pharmaceutical & HC | 0 | Automotive | 1 | Unknown Man | 0 | Qualitative | 45 | Quantitative | 55 | Secondary analysis/desk research | 0 | Other | 99 | Active data collection | 0 | Passive data collection | 73 | Turnover invoiced to national clients | 27 | Turnover invoiced to international client |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   |   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|  | 23 | Store Support     | 22 | 2.500.001 - 3.000.000 | 30                     | 0  | 0                                             | 0 | 0                                          | 0 | 0                                     | 0  | 0                                                    | 10 | 5     | 0  | 0                   | 0  | 0                                  | 0 | 0         | 0 | 0                                       | 0 | 0                             | 0 | 0                 | 0 | 0                      | 0 | 0       | 0 | 0                          | 0 | 0                      | 0 | 0                   | 0 | 0          | 0 | 0           | 0 | 0           | 0  | 0            | 0  | 0                                | 0 | 0     | 0  | 0                      | 0 | 0                       | 0  | 0                                     | 0  | 0                                         | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 | 0 |



## BRANCHE OPTIMISTISCH OVER 2021

### ADVERTISING (MEDIA/RECLAME EN COMMUNICATIE)

|    |                               |    |
|----|-------------------------------|----|
| 1  | GfK Netherlands               | 86 |
| 2  | Markteffect                   | 14 |
| 3  | Motivation International      | 9  |
| 4  | Kantar Netherlands            | 8  |
| 5  | Neuristics                    | 5  |
| 6  | Metrixlab                     | 5  |
| 7  | Validators                    | 4  |
| 8  | Kien Panel Wizard             | 4  |
| 9  | BTC Mediatest                 | 3  |
| 10 | Newcom Research & Consultancy | 2  |

### COMMUNICATION/ CONCEPTTESTING/ADVERTISMENT

|    |                          |    |
|----|--------------------------|----|
| 1  | Metrixlab                | 33 |
| 2  | Ipsos                    | 19 |
| 3  | DVJ Research Group       | 19 |
| 4  | GfK Netherlands          | 17 |
| 5  | Skim                     | 15 |
| 6  | Validators               | 15 |
| 7  | I&O Research             | 15 |
| 8  | Motivation International | 13 |
| 9  | Kantar Netherlands       | 12 |
| 10 | Blauw Research           | 11 |

### CUSTOMER AND/OR EMPLOYEE SATISFACTION

|    |                    |    |
|----|--------------------|----|
| 1  | MMW2               | 25 |
| 2  | Kantar Netherlands | 23 |
| 3  | Ipsos              | 21 |
| 4  | MarketResponse     | 21 |
| 5  | GfK Netherlands    | 20 |
| 6  | Integron           | 20 |
| 7  | Underlined         | 15 |
| 8  | Customerys         | 15 |
| 9  | I&O Research       | 15 |
| 10 | Markteffect        | 14 |

### FAST MOVING CONSUMER GOODS

|    |                    |    |
|----|--------------------|----|
| 1  | Kantar Netherlands | 62 |
| 2  | Normec Sensory     | 50 |
| 3  | Metrixlab          | 28 |
| 4  | Skim               | 25 |
| 5  | GfK Netherlands    | 23 |
| 6  | Markteffect        | 23 |
| 7  | Ipsos              | 19 |
| 8  | Instes Consulting  | 14 |
| 9  | Blauw Research     | 14 |
| 10 | DVJ Research Group | 9  |

### FINANCIALS (BANK EN VERZEKERINGSWEZEN)

|    |                          |    |
|----|--------------------------|----|
| 1  | Ipsos                    | 19 |
| 2  | Epiphany                 | 16 |
| 3  | Motivation International | 16 |
| 4  | MMW2                     | 15 |
| 5  | GfK Netherlands          | 11 |
| 6  | Metrixlab                | 10 |
| 7  | DVJ Research Group       | 9  |
| 8  | Markteffect              | 9  |
| 9  | Kantar Netherlands       | 8  |
| 10 | Underlined               | 8  |

### BRAND-/POSITIONING-/ LIFESTYLE-/IMAGE-RESEARCH

|    |                          |    |
|----|--------------------------|----|
| 1  | Kantar Netherlands       | 72 |
| 2  | Markteffect              | 64 |
| 3  | Ipsos                    | 41 |
| 4  | DVJ Research Group       | 25 |
| 5  | Metrixlab                | 25 |
| 6  | Motivation International | 15 |
| 7  | Validators               | 15 |
| 8  | I&O Research             | 15 |
| 9  | Epiphany                 | 14 |
| 10 | Blauw Research           | 11 |

### ONLINE RESEARCH

|    |                          |     |
|----|--------------------------|-----|
| 1  | Kantar Netherlands       | 129 |
| 2  | Metrixlab                | 83  |
| 3  | Markteffect              | 65  |
| 4  | DVJ Research Group       | 62  |
| 5  | Blauw Research           | 42  |
| 6  | MMW2                     | 38  |
| 7  | Epiphany                 | 31  |
| 8  | Skim                     | 30  |
| 9  | Motivation International | 29  |
| 10 | MarketResponse           | 26  |

### PRODUCT DEVELOPMENT- USAGE- AND BEHAVIOURAL-RESEARCH

|    |                    |     |
|----|--------------------|-----|
| 1  | GfK Netherlands    | 129 |
| 2  | Normec Sensory     | 50  |
| 3  | Ipsos              | 29  |
| 4  | Epiphany           | 27  |
| 5  | Metrixlab          | 24  |
| 6  | Blauw Research     | 22  |
| 7  | Kantar Netherlands | 17  |
| 8  | DVJ Research Group | 16  |
| 9  | Skim               | 15  |
| 10 | I&O Research       | 15  |

### PUBLIC SECTOR (OVERHEID- ONDERWIJS, EDUCATIE)

|    |                          |    |
|----|--------------------------|----|
| 1  | I&O Research             | 50 |
| 2  | Kantar Netherlands       | 32 |
| 3  | Motivation International | 22 |
| 4  | Zorgfocuz                | 18 |
| 5  | MMW2                     | 18 |
| 6  | Desan Research Solutions | 16 |
| 7  | GfK Netherlands          | 14 |
| 8  | Markteffect              | 14 |
| 9  | DVJ Research Group       | 12 |
| 10 | Tota Research            | 8  |

### PHARMACEUTICAL & HEALTHCARE

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| 1  | Ipsos                         | 12 |
| 2  | Skim                          | 10 |
| 3  | Markteffect                   | 9  |
| 4  | Samheath                      | 9  |
| 5  | Newcom Research & Consultancy | 5  |
| 6  | Metrixlab                     | 5  |
| 7  | Epiphany                      | 4  |
| 8  | Fact onderzoek                | 4  |
| 9  | MarketResponse                | 4  |
| 10 | Edi research & marketing      | 4  |

### Toelichting puntenverdeling en ranking

De omzetopgave, het aantal FTE en de onderverdeling van de omzet naar de verschillende onderzoek- en adverteerderssegmenten is opgegeven door het betreffende onderzoeksbureau. De MDA neemt geen verantwoordelijkheid voor de juistheid van die opgaven. Voor dit overzicht is het aantal FTE gerelateerd aan de omzetsectoren (FTE maal percentage omzet). Dat levert een puntenaantal op dat bruikbaar is om per omzetsector het gewicht te bepalen van een bij MDA aangesloten marktonderzoeksbureau. Een bureau met 100 FTE dat - volgens eigen zeggen - 10% van zijn omzet haalt uit klanten in de FMCG, scoort daarmee 10 punten (100 van 100). Een bureau met 40 FTE dat 50% van zijn omzet haalt uit FMCG scoort 20 punten (50% van 40). Al met al levert dit overzicht een inschatting van de marktomvang per bureau per adverteerdersector. Het onderzoek werd uitgevoerd in de maand november 2020. Het project werd aangestuurd door het MOA-secretariaat. Diederik Ritberg (intellel) was verantwoordelijk voor de verwerking van de data. De volledige lijst van deelnemende bureaus leest u op [marketingbureau.nl/moebureau/lijst](https://marketingbureau.nl/moebureau/lijst).

