Introduction

Overview
Our Numbers
Clients
Sales
History
Business Area
Organization
Global Network
Global Panel
No.1 Market Research Company in Korea

1,000+ No.1 Nationwide Working for more than 1,000+ Clients

10% No.1 in Annual Revenue Growth over the last 4 years

1,500,000+ No.1 in Panel Size No. of Research Panel 150+ million
We communicate and conduct the largest number of projects for our clients in Korea.

**Number of Clients**
1,000 Companies & Organizations
Conduct the projects for more than 900 companies and organizations over a year.

**Number of Projects**
4,800 Projects
Conduct the largest number of projects annually in the market research industry.

**Industry Coverage**
B2C All-Industry Sector
Cover the widest range of industries in Korea.
**Clients**

We cover the variety of studies for all industries

### Number of Projects by Business Sector in FY21

<table>
<thead>
<tr>
<th>Electronics</th>
<th>Automobile</th>
<th>IT/Mobile/Game</th>
<th>Telecomm</th>
<th>Finance</th>
<th>Retail</th>
<th>Foods</th>
<th>Health &amp; Beauty</th>
</tr>
</thead>
<tbody>
<tr>
<td>100</td>
<td>88</td>
<td>170</td>
<td>91</td>
<td>124</td>
<td>45</td>
<td>324</td>
<td>117</td>
</tr>
</tbody>
</table>

- Samsung
- Hyundai
- Kakao
- NAVER
- Coway
- Kia Motors

<table>
<thead>
<tr>
<th>Construction</th>
<th>Government</th>
<th>Healthcare</th>
<th>Fashion</th>
<th>Tourism</th>
<th>Education</th>
<th>University/Lab</th>
<th>Service</th>
</tr>
</thead>
<tbody>
<tr>
<td>74</td>
<td>765</td>
<td>89</td>
<td>27</td>
<td>94</td>
<td>33</td>
<td>1,550</td>
<td>1,114</td>
</tr>
</tbody>
</table>

- DI Holdings
- 서울특별시
- 동아제약
- NEPA
- 현대건설

**Clients**

We cover the variety of studies for all industries
We are No.1 Online Research Company in Korea, leading the Marketing Research Industry

Highest growth in the industry

**Compound Annual Growth Rate (CAGR)** compared to competitors

<table>
<thead>
<tr>
<th></th>
<th>FY18</th>
<th>FY19</th>
<th>FY20</th>
<th>FY21</th>
</tr>
</thead>
<tbody>
<tr>
<td>Macromill Embrain</td>
<td>351</td>
<td>391</td>
<td>411</td>
<td>438</td>
</tr>
<tr>
<td>H</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>K</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>I</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>G</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Unit: 100 million won

* Macromill Embrain: June Settlement, Company H: March Settlement, Company K, I and G: December Settlement
We grow steadily since establishment in ‘98, becoming the only KOSDAQ-listed company in 2020.

- **1998**: Founded Korea Panel Research Co., Ltd.
- **2000**: Company name changed to Embrain Co., Ltd.
- **2005**: Selected as Tech-Innovative Business (INNO-BIZ).
- **2011**: Granted ISO 9001 certification.
- **2012**: Merged with Macromill Group. Company name changed to Macromill Embrain Co., Ltd.
- **2014**: Exceeded more than one million panels.
- **2016**: Won Grand Prize for Panel Power App & Smart App Award. Won Grand Prize for Panel Power Web Award Korea.
- **2017**: Insu Choi, CEO was appointed as President of Korea Research Association.
- **2018**: 20th Anniversary of Macromill Embrain.
- **2020**: Listed on KOSDAQ.
- **2021**: Number of survey panel subscribers over 1.5 million.
We provide research services for marketing and public opinions, as well as expanding to Panel Big Data

**Business Area**

**Marketing Research**
- We provide research services for marketing and public opinions, as well as expanding to Panel Big Data

**Public Opinion & Academic Research**
- We conduct different researches for public opinions, omnibus surveys and academic thesis

**Panel Big Data**
- We process and provide behavior data like smartphone app usage, location information, credit card payment and shopping item data as per clients’ need

**Consumer Research**
- We are capable of quantitative and qualitative studies in various solutions to provide the insightful outcome

**Public & Academic Research**
- We conduct different researches for public opinions, omnibus surveys and academic thesis

**Data Syndication**
- We process and provide behavior data like smartphone app usage, location information, credit card payment and shopping item data as per clients’ need
We offer the best optimized results with systematic cooperation between Research, Fieldwork and R&D divisions.
Macromill Embrain is a subsidiary company of Macromill Group with 50 regional offices in 21 countries worldwide.

**Office**
- 50 offices in 21 countries worldwide
- More than 2,600 employees
- More than 1,000 researchers

**Panel**
- Total 110 millions global panels, covering more than 90 countries

**Client**
- Over 4,000 clients including Top 100 global brands

**Project**
- More than 30,000 projects annually

**EMEA**
- Rotterdam
- London
- Paris
- Hamburg
- Barcelona
- Madrid
- Dubai

**Asia**
- Tokyo
- Osaka
- Aichi
- Miyagi
- Seoul
- Shanghai
- Singapore
- Hyderabad
- Mumbai

**America**
- Cincinnati
- Denver
- Florham Park
- Minneapolis
- Norwalk
- Farmington
- Chicago
- Scottsdale
- Mexico City
- Sao Paulo
- Buenos Aires
We conduct various global projects with the global panel network.

Worldwide Panel Numbers

- **United States**
  - Precision Sample: 2,598,202
- **Europe**
  - MetrixLAB: 2,210,264
- **South Korea**
  - Macromill: 1,528,726
- **Japan**
  - Macromill: 1,337,488
  - EOL embrain: 153,349
- **South-East Asia**
  - W&S Market Research: 1,598,254
- **Taiwan**
  - EOL embrain: 153,349
- **South America**
  - Precision Sample: 933,340
Our Competence

Core Competence
Panel Size
Panel Management
Panel Usefulness
Panel Big Data
Expert Group
Automated System
Our core competences are Panels, Professional Organization and Automated System

Largest Panels in Korea & Management System
Capable of conducting large-scaled research with representativeness and credibility

Differentiated Organization Structure
Research Consulting Division
Research Advisory Division
Panel Big Data Center
Trend-monitor

Automated System enhancing Efficiency
ISAS/FMS
Q-Bank
RPA Reporting
Smart Coding/Gang/Report
Panel Size

We own the largest number of panels to be No.1 Online Research Company in Korea

Demographically Representative 1.5M Survey Panels

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Macromill Embrain Panel</th>
<th>National Census</th>
</tr>
</thead>
<tbody>
<tr>
<td>Male</td>
<td>44%</td>
<td>51%</td>
</tr>
<tr>
<td>Female</td>
<td>56%</td>
<td>49%</td>
</tr>
<tr>
<td>14~19y.o</td>
<td>16%</td>
<td>9%</td>
</tr>
<tr>
<td>20~29y.o</td>
<td>32%</td>
<td>20%</td>
</tr>
<tr>
<td>30~39y.o</td>
<td>27%</td>
<td>20%</td>
</tr>
<tr>
<td>40~49y.o</td>
<td>16%</td>
<td>25%</td>
</tr>
<tr>
<td>50~59y.o</td>
<td>9%</td>
<td>26%</td>
</tr>
</tbody>
</table>

As of Jan, 2022

What is the Survey Panel?
Survey panels are different from general online members as they agreed to participate in the survey and provide the personal information via the contract with Macromill Embrain.
We secure high-quality data by implementing a systematic panel management policy from subscription to withdrawal.

**Panel Management**

**Recruit**
- Voluntarily subscribe via online
- Join by recommendation of existing panel

**Join**
- User authentication
- Thank-you Survey

**Activation**
- Target sampling based on panel information and big data
- Participation frequency management
- Drop-out management
- Insincere respondent management

**Dormancy**
- Survey leading to activation

**Withdrawal**
- Management by classifying withdrawal types
Our Competence

Collect Latest Panel Information

Conduct annual regular panel profile surveys
Collect purchase & usage data of approx. 800 categories

<table>
<thead>
<tr>
<th>Basic Panel Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Household</td>
</tr>
<tr>
<td>Customer Goods</td>
</tr>
<tr>
<td>F&amp;B</td>
</tr>
<tr>
<td>Transportation</td>
</tr>
<tr>
<td>Hobby</td>
</tr>
</tbody>
</table>

Improve Sampling Efficiency

Reduce fieldwork duration and research cost by targeting survey respondents with specific criteria

Example of Robot Vacuum Cleaner

No basic information
Random Mailing

Full panel
Vacuum cleaner holder
Robot vacuum cleaner holder

Drop-out rate
Fieldwork duration
Cost

No basic information
Random Mailing

Drop-out rate
Fieldwork duration
Cost
We provide integrated insights by combining survey result and big data analysis.

Combining Survey Result + Panel Profile, Online/Offline Behavior, Actual Purchase Behavior Information

Discovering New and In-depth Consumer Insights in Integrated Perspective
Panel Big Data Difference

Panel Big Data enables to analyze by segments including attitudinal data

<table>
<thead>
<tr>
<th>General Big Data</th>
<th>Panel Big Data</th>
</tr>
</thead>
<tbody>
<tr>
<td>Available for only own customer’s information on own service (e.g.) big data sold by companies like Shinhan Card, SK Telecom is limited to own transaction data</td>
<td>Contains service data provided by all parties (e.g.) usage from all credit card holders for payment information</td>
</tr>
<tr>
<td>Information provider unknown Possibility of distorted analysis focusing on heavy user (e.g.) ‘Online comment-rigging scandal’, ‘Druking’</td>
<td>Information provider known Possibility of analysis by segments as well as by total</td>
</tr>
<tr>
<td>Behavioral(consumption) data</td>
<td>Behavioral(consumption) data + Attitudinal data</td>
</tr>
<tr>
<td>Only available for big data analysis at individual level</td>
<td>Possible to analyze by integrating a variety of big data using ‘panel ID’ as key value</td>
</tr>
</tbody>
</table>
We provide a centralized customer support service from research consultation to post management by Research Consultants.

**Expert Group**
Research Consulting Division

**Research Consultant**

- **Consultation**: Provide basic guidance on research progress by identifying the issues that clients confront.
- **Design**: Propose with optimized research methodology, after consultation with research division.
- **Management**: Maintain continuous relationship with the designated Research Consultant after the completion of study.
Our Competence
Expert Group
Research Advisory Division

Experts with technical know-how and experiences support advice across all stages of study from proposal to analysis

Research Specialist

Marketing & Quantitative Expert
Consult on quantitative approach and provide with marketing insights to solve business issues

Consumer & Qualitative Expert
Consult on qualitative approach and provide with consumer insights to understand consumer lifestyle/ behavior/ thought

Marketing Science & AA Expert
Support with Advanced Analytics (AA) and consult on customized solution for research issues

UX & Design Expert
Consult on UX/ UI/ UT Approach, Analysis & Solution
Our Competence
Panel Big Data Center

Panel Big Data Scientist
Panel Big Data + AI Modeling = New Business Model

We discover the new business with high value by applying AI to Panel Big Data

Panel Big Data

AI Modelling

Exploratory Consumer Analysis
Integrated AD Effectiveness Survey
Automatic VOC Classification Model
Expert Group
Trendmonitor

We publish books and deliver lectors with in-depth analysis on the trends across the society

Click it! https://www.trendmonitor.co.kr
Post the latest trends analysis on website
Average of more than 10 media quote to report every week

Trendmonitor Publications ('10~'21)

|------|------|------|------|------|------|------|------|------|------|------|------|
Automated System

We execute projects fast and accurately by introducing automated survey system

FMS
Online Fieldwork Management Solution

ISAS
Web Survey Programming Solution

Q-Bank
Questionnaire Development Automated System (in Word format)

Smart Gang
Gang Survey Fieldwork Management Solution

Smart Coding
Open-ends Coding Automated System

Smart Report
Online Analysis Platform

RPA Reporting
Report Design Automated System
03 Facility & Donation
We have specialized research facilities, allowing you to conduct for various purposes.

### Quantitative Research
- Gang Survey Room
- CATI Room
- Kitchen

### Qualitative Research
- FGD Room
- FGD Room
- Usability Test Room

### Other Facilities
- Observation Room
- Meeting room
- Taste Test Preparation Room
Donation History

We have been sharing for 16 years, starting with small love

1%+D\text{\ding{114}}\text{NATION}

With 1\% of total reward points accumulated every month and donations from the panels, we practice love sharing to ‘Korean Organization for Rare Diseases’ and ‘Down Center’ to convey the hope to them.

Total number of participants 1,127,039

Donations up to date 597,860,220

<table>
<thead>
<tr>
<th></th>
<th>2022</th>
<th>December 2021</th>
<th>November 2021</th>
<th>October 2021</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
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<td></td>
</tr>
</tbody>
</table>
| 100\% Sharing Happiness Story

Still in progress

Number of participants 8,253

Donations 6,845,300

Number of participants 10,438

Donations 7,570,650

Number of participants 9,440

Donations 5,708,090
Contact us

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Tel  02) 3444-4000
Web  www.embrain.com