



YouGov Capital Markets Day

17 November 2015

YouGov[®]

Agenda

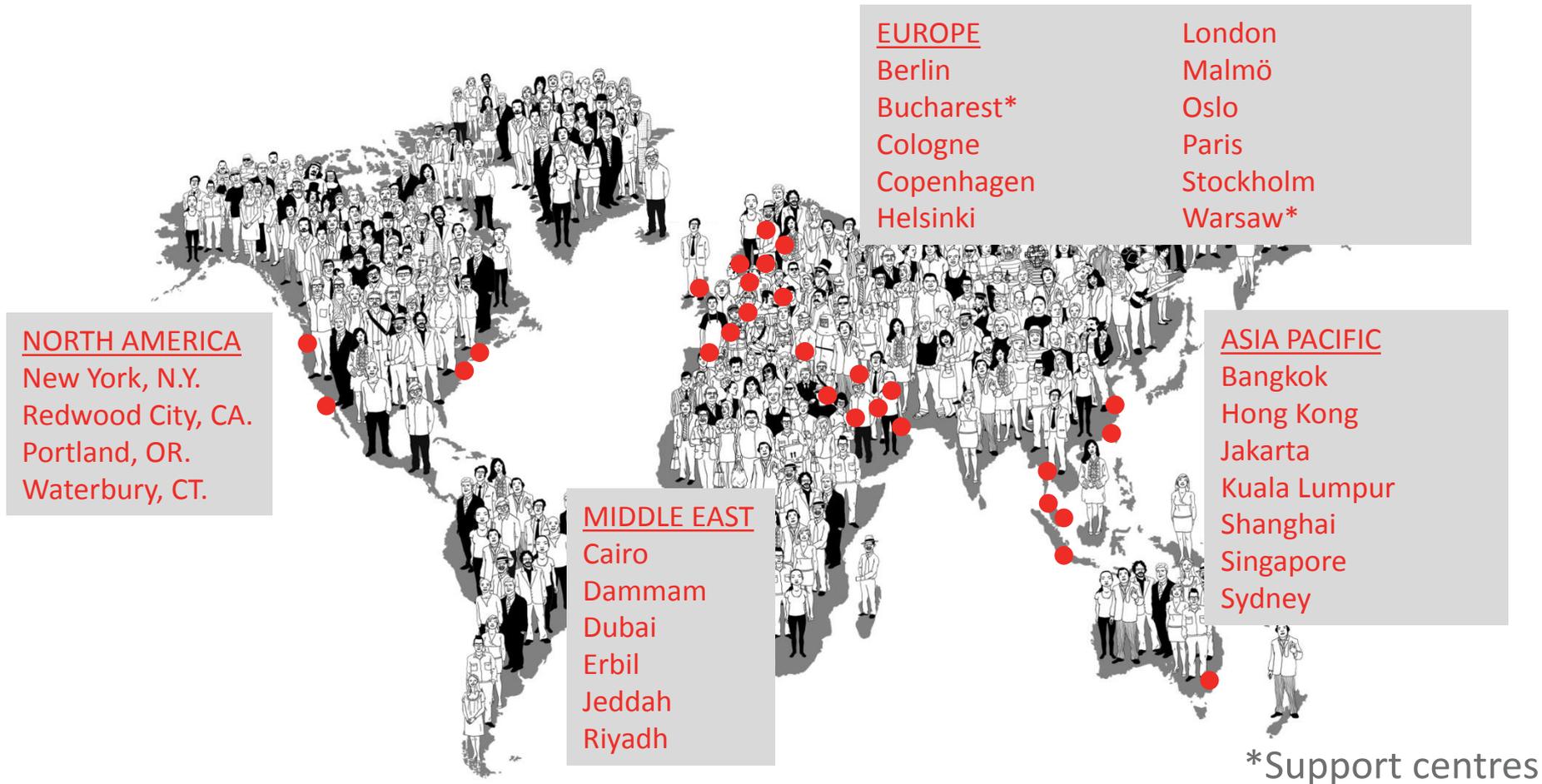
3.00pm	Welcome and Overview – Stephan Shakespeare, CEO
3.20pm	YouGov Online – Freddie Sayers, Chief Digital Officer
3.40pm	YouGov Profiles – Alex McIntosh, UK CEO
4.00pm	YouGov BrandIndex – Ted Marzilli, BrandIndex CEO
4.20pm	Coffee break
4.30pm	Crunch – Doug Rivers, Chief Scientist
4.40pm	YouGov Omnibus – Ray Martin, Omnibus CEO
4.55pm	The new world of research – Andy Morris, Chief Innovation Officer
5.10pm	Closing remarks – Stephan Shakespeare, CEO
5.20pm	Q&A
5.30pm	Product demos and drinks
6.30pm	Close

Welcome and Overview

Stephan Shakespeare – Chief Executive Officer



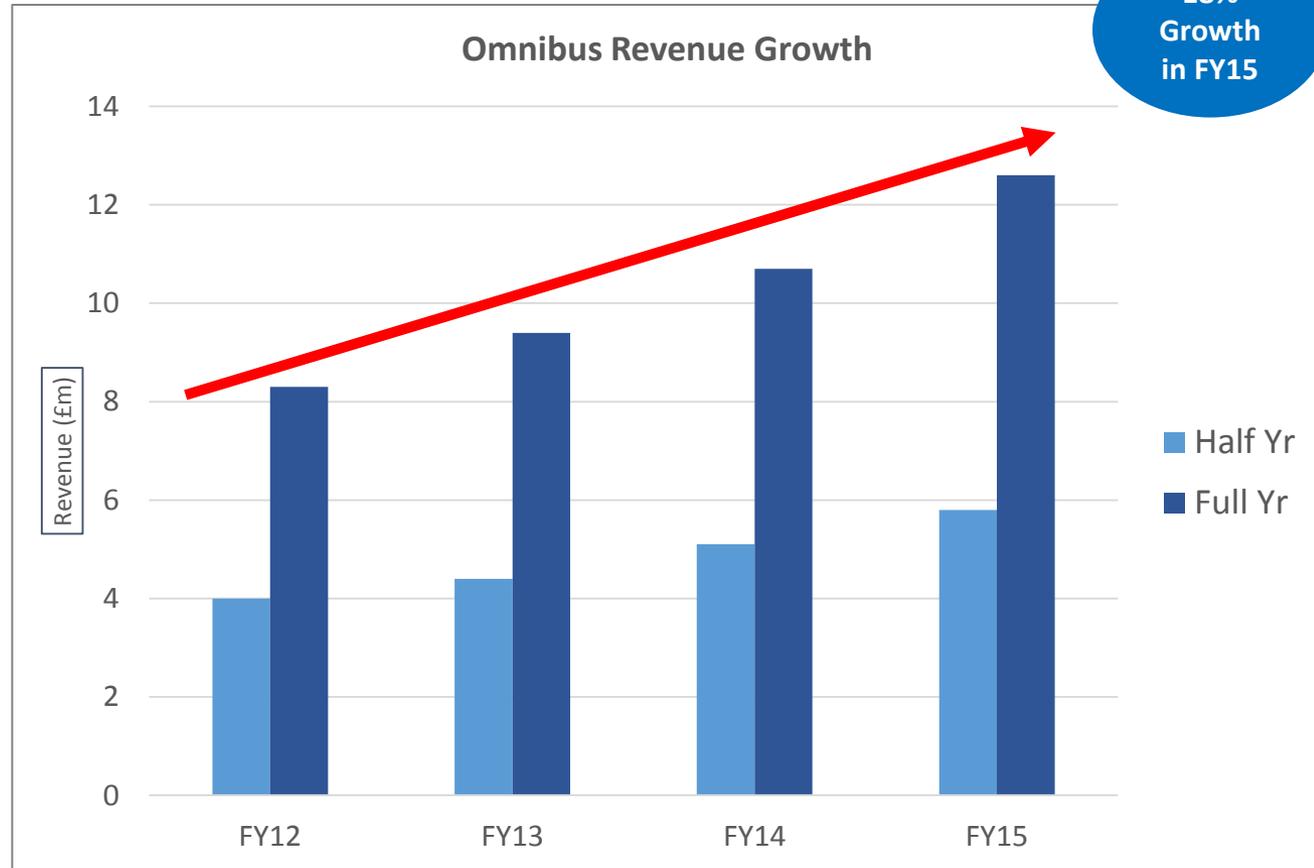
YouGov's geographic footprint



YouGov has one of the world's Top 10 international market research networks

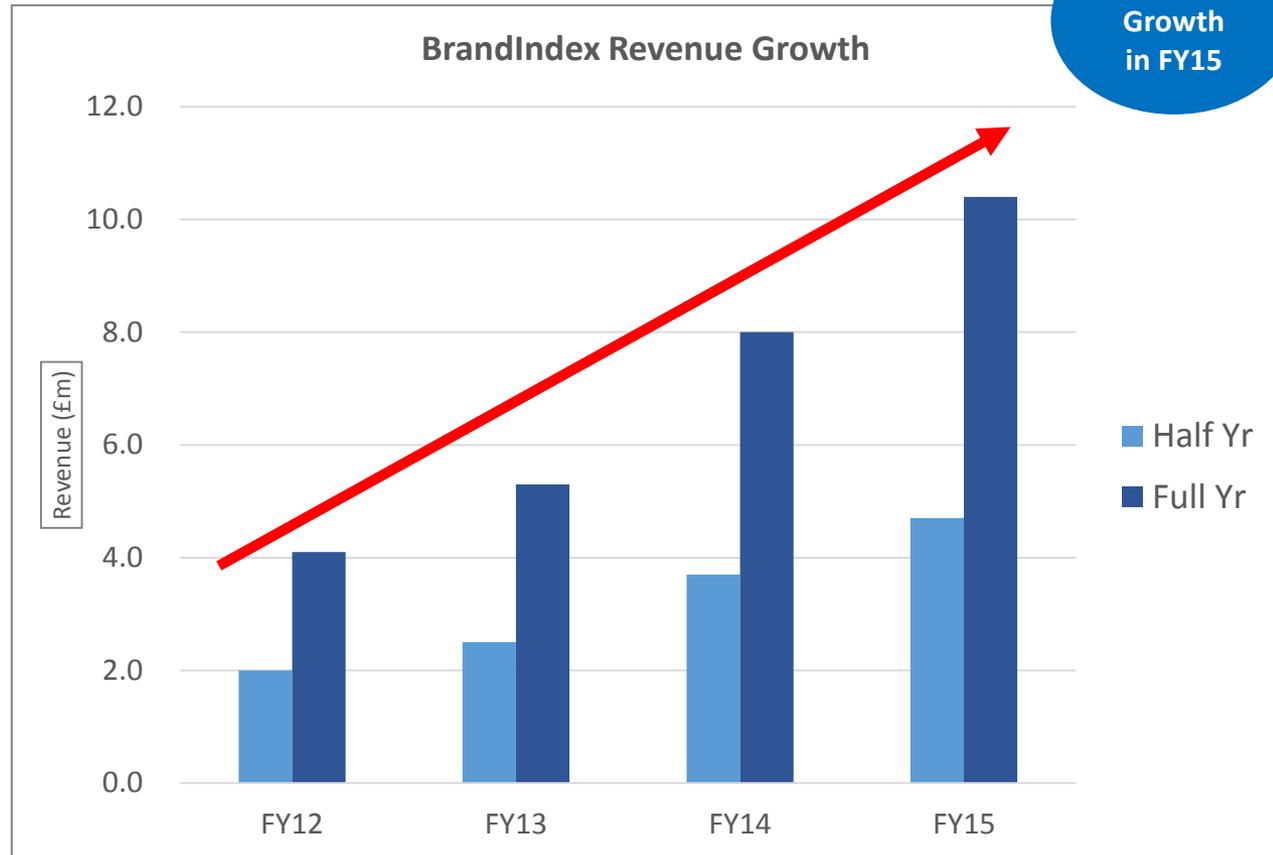
YouGov Omnibus

- Streamlined, highly-efficient production model
- Market leader in UK
- Now operating in UK, US, France, Germany, Nordic, Middle East and Asia Pacific
- 1,000+ clients worldwide



YouGov BrandIndex

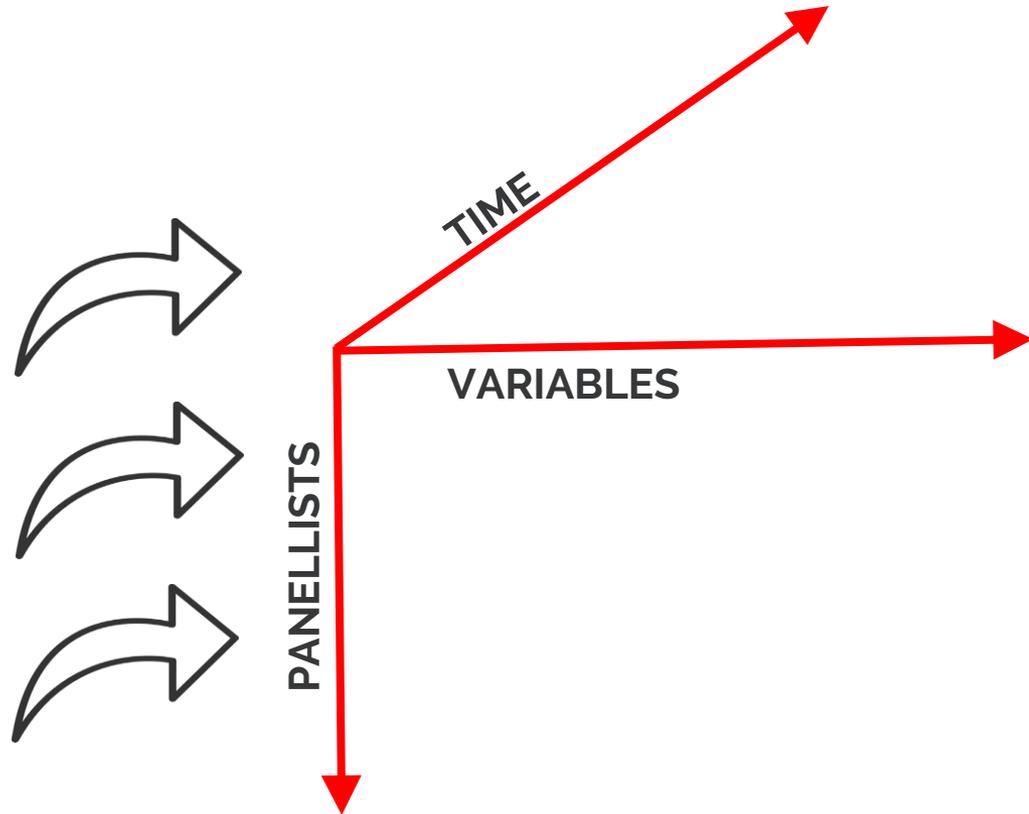
- Our flagship brand intelligence service
- Coverage grown to 24 countries
- Some 300+ subscribers worldwide
- Upside opportunity: large proportion of brands covered still to become subscribers



What is YouGov's new invention?

The YouGov Cube

- Surveys, BrandIndex, Trackers
- Opigram, long-tail self-entered data
- Digital tracking, social media

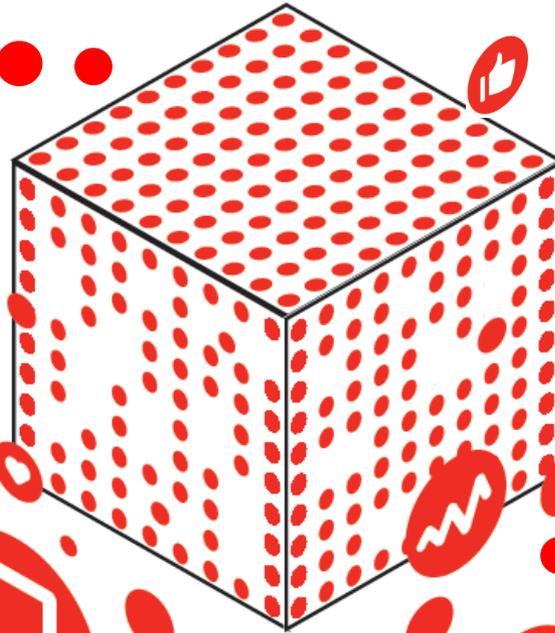


YouGov

What makes the YouGov Cube work?

- a) A large, engaged panel
- b) A variety of platforms for connected data-gathering
- c) Crunch (easy-to-use advanced analytics tool)

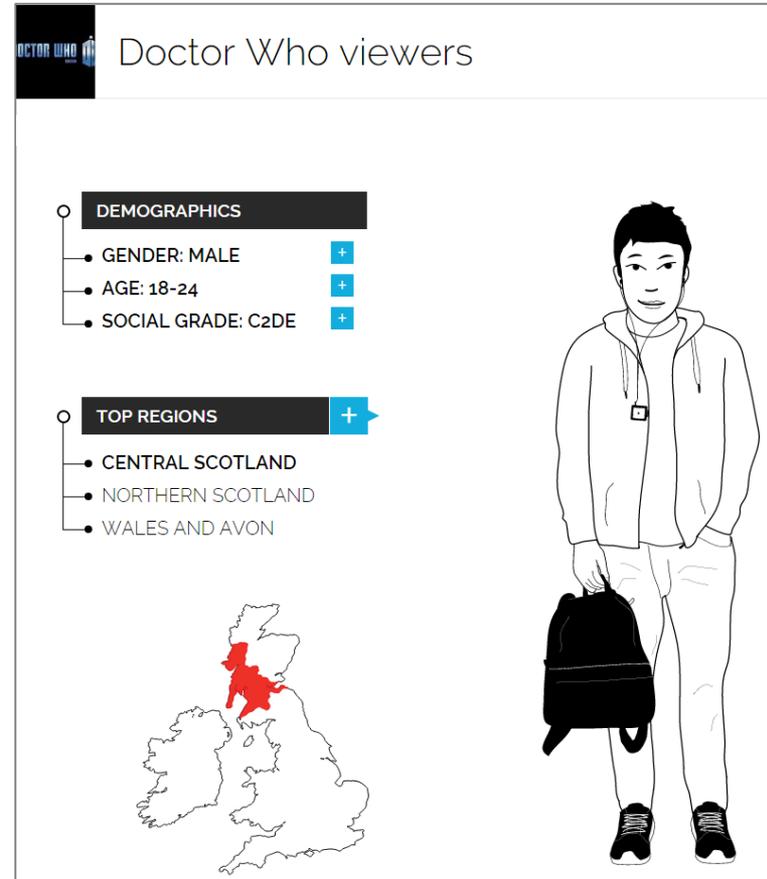
A variety of platforms for connected data-gathering



YouGov

Crunch (easy-to-use advanced analytics tool)

Combining profiles of 5003 Doctor Who viewers



YouGov now offers a fully integrated system supporting the marketer's workflow...

- a) Understanding: helping brands and organisations to understand their customers and stakeholders in depth and holistically
- b) Marketing: identifying target groups, planning and implementing campaigns
- c) Continuous monitoring: evaluation of marketing and spotting trends

YouGov's offer is differentiated from all others available today...

- a) The unprecedented range and depth of data
- b) The quality of single-source connected data (passive, digitally-derived and active survey-based)
- c) All the data already exists (and is updated daily)
- d) It's fast, cost-effective, and easy to use

You will hear from...

1. **Freddie Sayers, Chief Digital Officer:** on our data collection platforms and the interactive experience for website and mobile
2. **Alex McIntosh, UK CEO:** on our newest syndicated data product, YouGov Profiles
3. **Ted Marzilli, BrandIndex CEO:** on using our data to track change across global markets and to diagnose brand health
4. **Professor Doug Rivers, Chief Scientist:** our statistical guru and inventor of Crunch will demonstrate our new cloud-based analytics tool
5. **Ray Martin, Omnibus CEO:** on how we are making research more efficient and more useful to clients
6. **Andy Morris, Chief Innovation Officer:** on how our suite of products and services changes all of research, both data and custom, and where we are going next

YouGov Online

Freddie Sayers – Chief Digital Officer



When YouGov was founded in 2000, there weren't many ways to share your opinion on the internet...

Can YouGov be scientific and still compete online?

Research companies

Sample Providers



Self-service Polling



Panel Management



Research Agencies



Opinion websites

Rate & Review



Recommendations



Social Media



Opinion Networks



Commenting on news



In 2013, YouGov acquired Opigram: increasingly responsible for more and more data collection

Research companies

Opinion websites

Sample Providers



Toluna SSI e-Rewards

Self-service Polling



uSamp THE ANSWER NETWORK SurveyMonkey™

Panel Management



VISIONCRITICAL™

Research Agencies



GfK Ipsos MORI YouGov



OPIGRAM

Recommendations



goodreads hunch livestar★ amazon

Rate & Review



yelp tripadvisor review centre ciao!

Social Media



facebook twitter

Opinion Networks



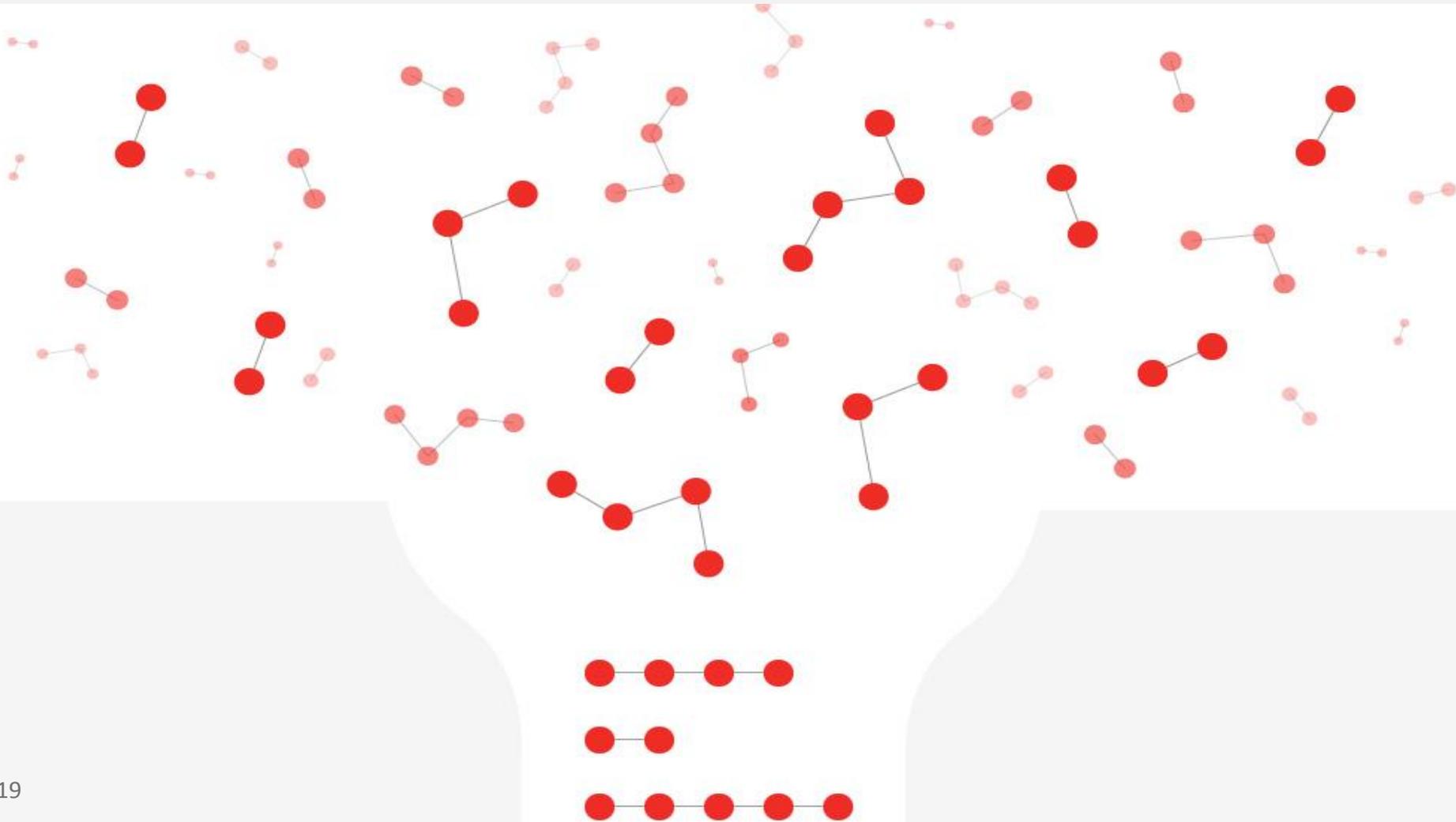
STATE OPINSY Every Opinion Counts. Amen. thumb Instant opinions. Real.

Commenting on news



GAWKER THE HUFFINGTON POST MailOnline

Instead of full-length surveys, Opigram constructs a never-ending 'feed' for people: a constant conversation



Your feed is a fun survey that you can control...

Search...

MY FEED

MY PROFILE

MY ACCOUNT

MY CONNECTIONS

ONLY SHOW ME...

RATINGS

OPINIONS

PREDICTIONS

SURVEYS

FILTER BY TOPIC

INTERESTS

POLITICS

CULTURE

MEDIA

ENTERTAINMENT

SPORTS

SHOPPING

TECHNOLOGY

FOOD & DRINK

PLACES

TOP TV

These TV programmes are getting a lot of buzz right now - have you watched any of them? Click to rate



Refresh

GREEN ENERGY

How much of a government priority should converting to "green" and renewable energy sources be?

- A top priority
- A priority, but not a top priority
- Not much of a priority
- Not a priority at all

MY NOTIFICATIONS

- 2 people voted on your opinion on Bernie Ecclestone
- Member 69154 voted on your opinion on Andrew Neil
- Member 69154 voted on your opinion on Matthew Parris

More

AVAILABLE SURVEYS

- A new survey Live since Tue October 27 2015, 6:19 p.m. GMT
Take the Survey
- A new survey Live since Wed October 7 2015, 5:44 p.m. GMT
Take the Survey
- A new survey Live since Thu September 17 2015, 10:04 p.m. GMT
Take the Survey

More

ADD AN OPINION ON...

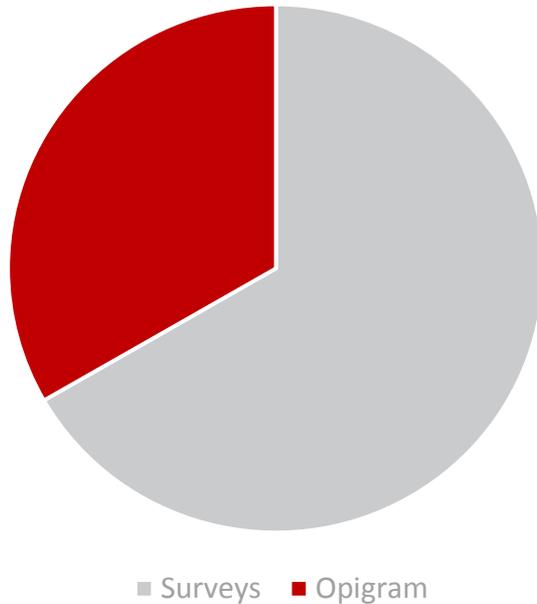
Choose Topic...

....and everything is stored on your Opigram profile



Opigram is now one of our main data collection platforms

Source of Data Points (UK)



- In the UK, approximately one-third of the data we collect is now collected via Opigram

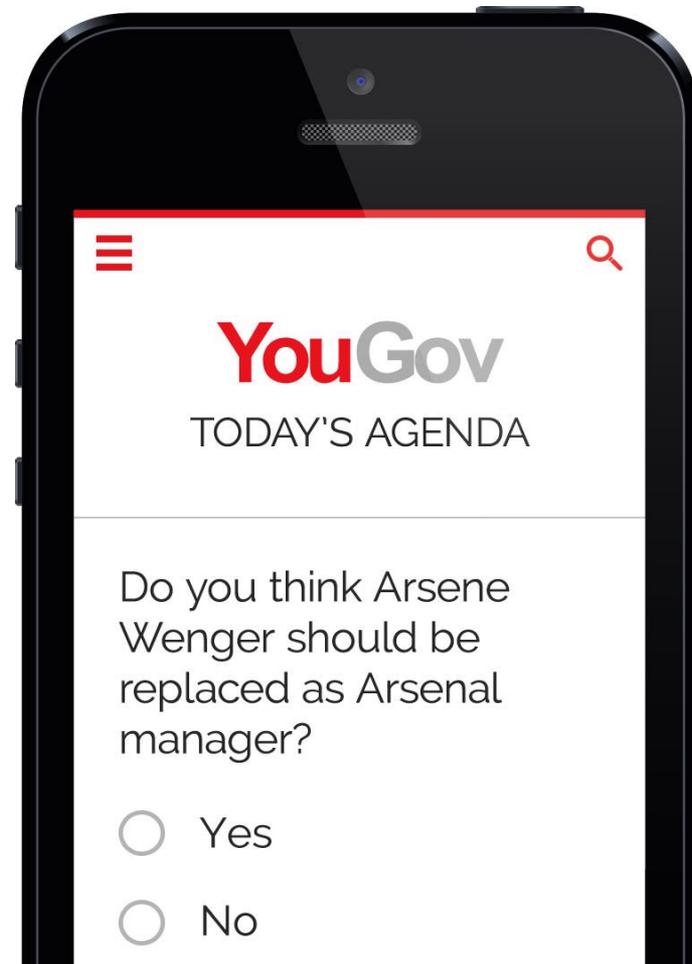
What next?

Our online offer: reasons to take part

- Interest: stimulating, important questions
- Social: define yourself in the community
- Rewards: earn money and prizes

1. Make participation easier with native YouGov app

- Daily questions
- Fill in profile
- Notifications to surveys



2. Expand reach across third party websites

The screenshot shows the Yahoo! Sport website interface. At the top, there is a navigation bar with the Yahoo! Sport logo, Eurosport .COM logo, a search bar, and links for 'Hello, Mark', 'Help', 'Get the News Digest app', 'Mail', and 'Yahoo'. A left sidebar contains a menu of sports categories: Home, Football, Photos, Videos, Eurobot, Transfer News, Premier League, Championship, Scottish Football, Champions League, Europa League, FA Cup, League Cup, Euro 2016 Qualifiers, La Liga, Other Leagues, and More. Below the menu is a list of other sports: Tennis, F1, Motorsport, Superbikes, Cricket, Rugby Union, Cycling, Boxing, Golf, Athletics, and More Sports. The main content area features a large video player showing Arsene Wenger speaking at a press conference. Below the video is a headline: 'Arsene Wenger: Slow start cost us three points at United'. Underneath the headline is a video player with a duration of 0:47 and a timestamp of '6 hours ago'. The video description reads: 'Arsene Wenger reflects on the 1-1 draw against Manchester United, which more or less confirms the Gunners in the top three for the season.' To the right of the main content is a 'Top Headlines' section with several article teasers. Below that is a 'TODAY'S QUESTION' section with a poll question: 'Do you think Arsene Wenger should be replaced as Arsenal manager?' with 'Yes' and 'No' options. The poll is powered by YouGov. At the bottom right, there is a 'Top Videos' section with a video thumbnail for 'Euro Papers: Manchester...'.

Hello, Mark | Help

YAHOO! SPORT UK & IRELAND

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Championship

Scottish Football

Champions League

Europa League

FA Cup

League Cup

Euro 2016 Qualifiers

La Liga

Other Leagues

More

Tennis

F1

Motorsport

Superbikes

Cricket

Rugby Union

Cycling

Boxing

Golf

Athletics

More Sports

Arsene Wenger: Slow start cost us three points at United

6 hours ago 0:47

Eurosport Videos - UK

Arsene Wenger reflects on the 1-1 draw against Manchester United, which more or less confirms the Gunners in the top three for the season.

Top Headlines

Louis van Gaal can smile and gloat, but the jury is still out

Final day's true drama rests on the trauma of relegation, not the joy of glory

New Seat Car Deals

Euro Papers: Manchester United table enormous bid for Lazio's Felipe Anderson

Liga - Who is better? Lionel Messi in 2009 or 2015?

Premier League - Jose Mourinho rejects Real Madrid return - but who will take over?

The Importance of Landlord Insurance

TODAY'S QUESTION

Do you think Arsene Wenger should be replaced as Arsenal manager?

Yes

No

Powered by YouGov

Top Videos

Euro Papers: Manchester

Bringing together our
audiences

YouGov can be seen as a single web application



In today's world, B2B clients expect the same level of User Experience they are used to as consumers

Profiles LITE now generating leads in UK, successfully launched in US, Germany

The image displays three overlapping screenshots of the YouGovProfiles LITE interface, illustrating the user experience for Coca-Cola customers in different countries.

- Top Screenshot (UK):** Shows the interface for "Customers of Coca-Cola" in the UK. The navigation menu includes DEMOGRAPHICS, LIFESTYLE, PERSONALITY, BRANDS, ENTERTAINMENT, ONLINE, and MEDIA. The "UPGRADE TO" button is visible.
- Middle Screenshot (US):** Shows the interface for "Customers of Coca-Cola" in the US. The navigation menu includes DEMOGRAPHICS, LIFESTYLE, PERSONALITY, BRANDS, ENTERTAINMENT, ONLINE, and MEDIA. The "UPGRADE OPTIONS" button is visible.
- Bottom Screenshot (Germany):** Shows the interface for "Coca-Cola-Kunden" in Germany. The navigation menu includes DEMOGRAPHIE, LIFESTYLE, PERSÖNLICHKEIT, MARKEN, UNTERHALTUNG, and MEDIEN. The "MEHR INFORMATIONEN" button is visible.

The German interface provides detailed demographic and lifestyle data for a customer profile:

- DEMOGRAPHIE:** GESCHLECHT: MÄNNL, ALTER: 35 BIS 44
- BUNDESLAND:** NIEDERSACHSEN, NORDRHEIN-WESTFALEN, RHEINLAND-PFALZ, SCHLESWIG-HOLSTEIN, HESSEN
- POLIT. SELBSTEINSTUFUNG:** LINKS, RECHTS
- TYPISCHE BRANCHEN:** TRANSPORT & LOGISTIK, VERSICHERUNG, BAUWESEN
- HAUSHALTSEINKOMMEN:** 2.000€ - 3.500€

A central illustration of a man in a white polo shirt and light-colored pants represents the customer profile. A map of Germany highlights the state of Niedersachsen.

Our new website offers clear routing for those three audiences to find what they are looking for

The screenshot shows the YouGov UK website homepage. At the top left is the YouGov logo with 'UNITED KINGDOM' and a UK flag icon. At the top right are 'Login' and '+ Join' buttons, and a search bar. The main heading reads 'Welcome to YouGov UK. What would you like to do?'. Below this are three main navigation cards: 'TAKE PART' (with a speech bubble icon and a photo of a stadium), 'SEE RESULTS' (with a bar chart icon and a photo of a female athlete), and 'FIND SOLUTIONS' (with a target icon and a group of people illustration). A 'Feedback' button is on the right edge. At the bottom, a red arrow points to the text 'WHAT IS YOUNGOV?'.

YouGov
UNITED KINGDOM

Login [+ Join](#)

Search

Welcome to YouGov UK. What would you like to do?

TAKE PART

Take today's poll on: Remembrance day
Were the people around you silent for 2 minutes at 11 am this morning?

SEE RESULTS

Latest: Ban Russia from Rio 2016 – public
68% support banning Russia from Rio 2016 – and perceptions of athletics' problem with doping have worsened for the third time

FIND SOLUTIONS

Discover our products and services
Latest: explore YouGov Profiles - our amazing new segmentation and media planning tool for agencies and their brands...

[Feedback](#)

WHAT IS YOUNGOV?

YouGov Profiles

Alex McIntosh – UK CEO



Agencies and brands are navigating a wide range of insight tools available to them

Clients are needing solutions that are:

-  **Integrated:** allowing users to map and fuse segmentations and ad-hoc work directly into a single product
-  **Holistic:** offering views of an audience's activity and engagement across offline, online and mobile channels
-  **Granular:** providing attitudinal and behavioural profiling for niche groups
-  **Innovative:** collecting passive data across digital and social sources
-  **Dynamic:** providing insight through data that is updated weekly

To address these needs, we launched **YouGov**Profiles

Our segmentation and media planning product for agencies and brands



The screenshot shows the YouGovProfiles interface for a segment titled "People who shop at Ocado". The Ocado logo is in the top left. Below it, there are two expandable sections: "DEMOGRAPHICS" and "TOP REGIONS".

- DEMOGRAPHICS** (expanded):
 - GENDER: FEMALE
 - AGE: 25-39
 - SOCIAL GRADE: ABC1
- TOP REGIONS** (expanded):
 - LONDON
 - SOUTH COAST
 - MIDLANDS

To the right of the lists is a line-art illustration of a woman with long dark hair, wearing a white dress and high heels, holding a black handbag. Below the lists is a map of the United Kingdom with a red dot indicating a location in the South East region.

- This new Data Product is powered by data collected in the YouGov Cube – our connected data vault.
- In the UK, the YouGov Cube holds over 120,000 data points, collected from over 250,000 YouGov panellists.

YouGov Profiles connects a multitude of data variables

Demographics and Lifestyles

Segment on a number of categories including general demographic makeup, economic situation, occupation, category specific usage and behaviour, interests, hobbies, favourite celebrities.

Attitudes and Opinions

Measure attitudinal and opinion data from a variety of topics around the values and beliefs that drive people's behaviour.

Brand Usage and Perception

Understand usage and perception of thousands of brands across dozens of industry sectors along 16 key purchase funnel measures.

Media Consumption

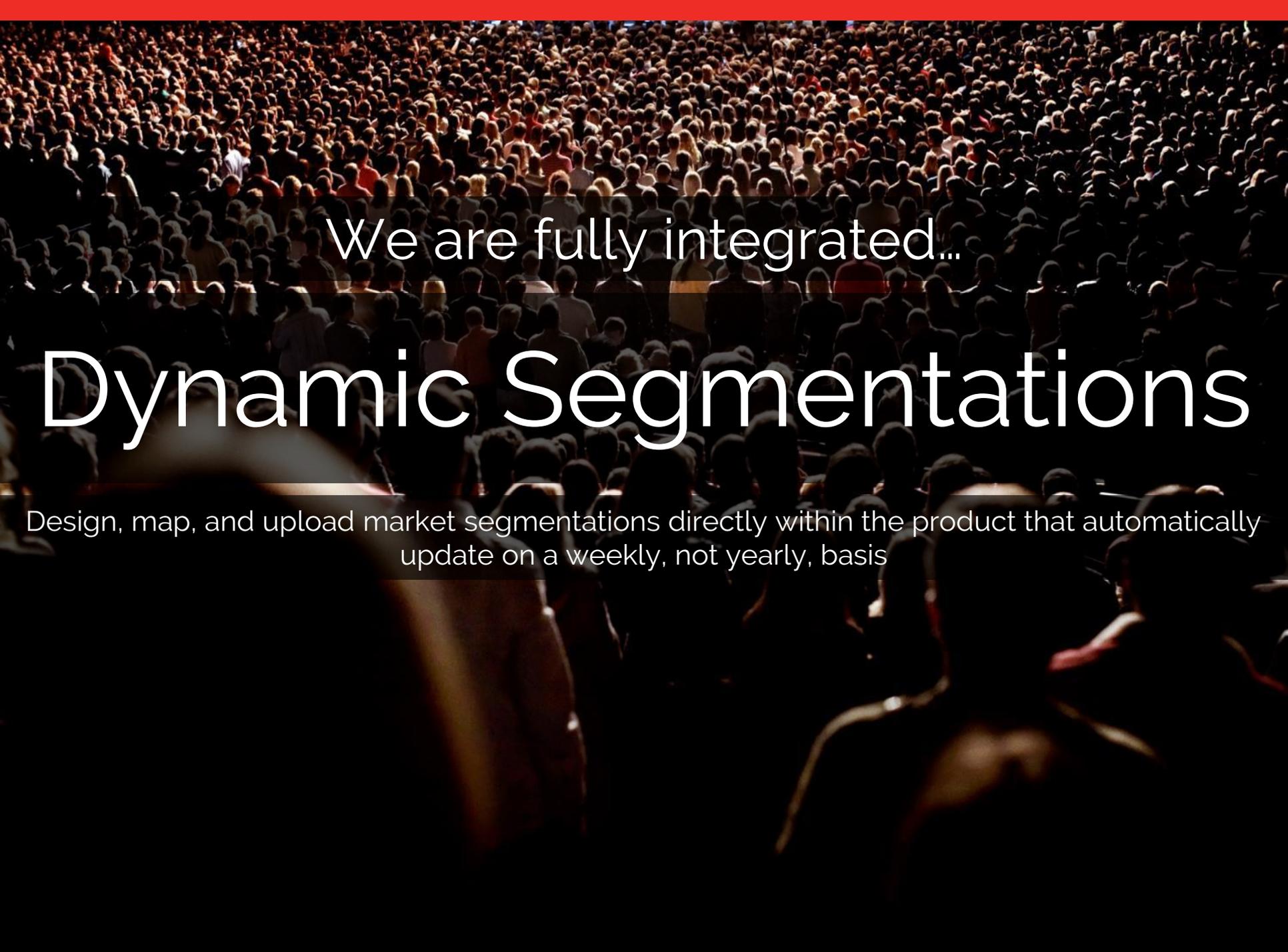
Analyse consumption of above-the-line media on a daily basis. This includes TV viewership at genre level and program level classifications, radio listenership (40+ key commercial stations) and print readership (national and local).

Online and Mobile Behavior

Identify actual (passively tracked) online and application usage (from desktops, laptops, smartphones and tablets) from every website and mobile application.

Social Media Engagement

Review social media engagement including Facebook pages likes and Twitter accounts followed.



We are fully integrated...

Dynamic Segmentations

Design, map, and upload market segmentations directly within the product that automatically update on a weekly, not yearly, basis



We are truly holistic...

360° Media Plans

Analyse data collected daily from the UK's largest ATL and BTL media consumption source to build more robust channel plans

A white electric car is parked at a charging station in a rural landscape. The car is on the left, and the charging station is on the right. A red charging cable connects the car to the station. The background shows a green field and a blue sky with some clouds. The scene is brightly lit, suggesting a sunny day.

We are more granular...

Niche Groups

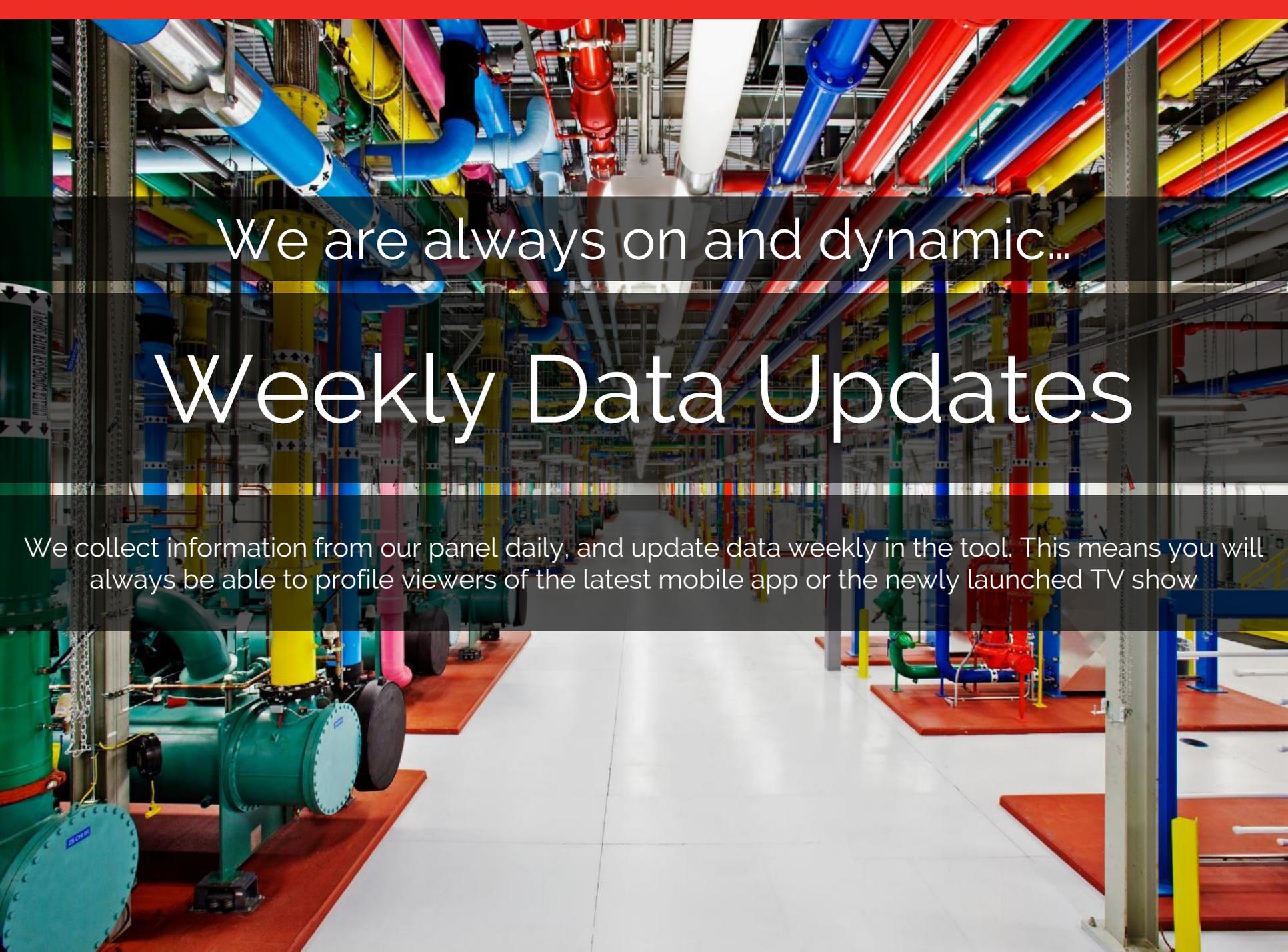
Obtaining robust sample sizes on hard to reach groups is made easier by reaching out to a sample of 250,000 UK consumers



We are always innovative...

Actionable Passive Analytics

The number one source for passive online, mobile, tablet and social data that has 100% accurate demographics attributed to everything visited, liked, downloaded and followed



We are always on and dynamic...

Weekly Data Updates

We collect information from our panel daily, and update data weekly in the tool. This means you will always be able to profile viewers of the latest mobile app or the newly launched TV show

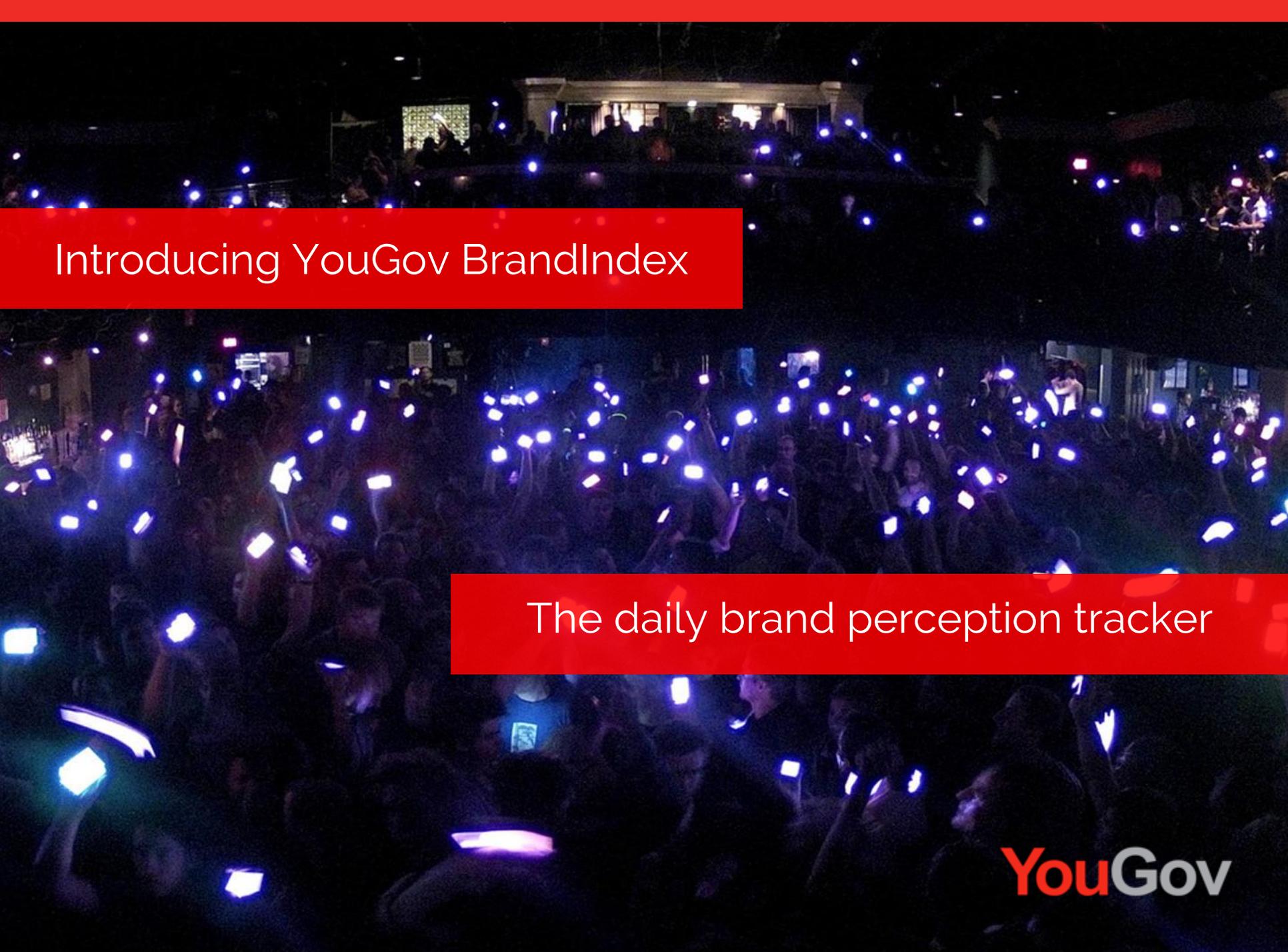
We deliver ROI to our clients

- ✓ **Opening** up access to insight across the business to create a more reactive culture; boosting staff skill-sets and reducing spend with 3rd party agencies
- ✓ **Reducing** investment in multiple insight products that serve different purposes by investing in one single-sourced 3rd party data solution that covers all needs while remaining completely flexible and customisable
- ✓ **Maximising** cut-through on campaigns, reducing spend waste by using more in-depth media consumption data that is collected daily
- ✓ **Designing** customer acquisition and retention strategies, with the ability to refine them in real-time at no additional cost
- ✓ **Increasing** overall brand equity (including artist awareness and consideration) through identifying brand partnership and sponsorship opportunities
- ✓ **Winning** more commercial opportunities and trading pitches by communicating better sector (and brand) knowledge to potential buyers than the competition, driving overall sales

YouGov BrandIndex

Ted Marzilli – CEO, BrandIndex



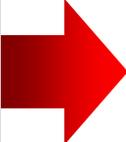
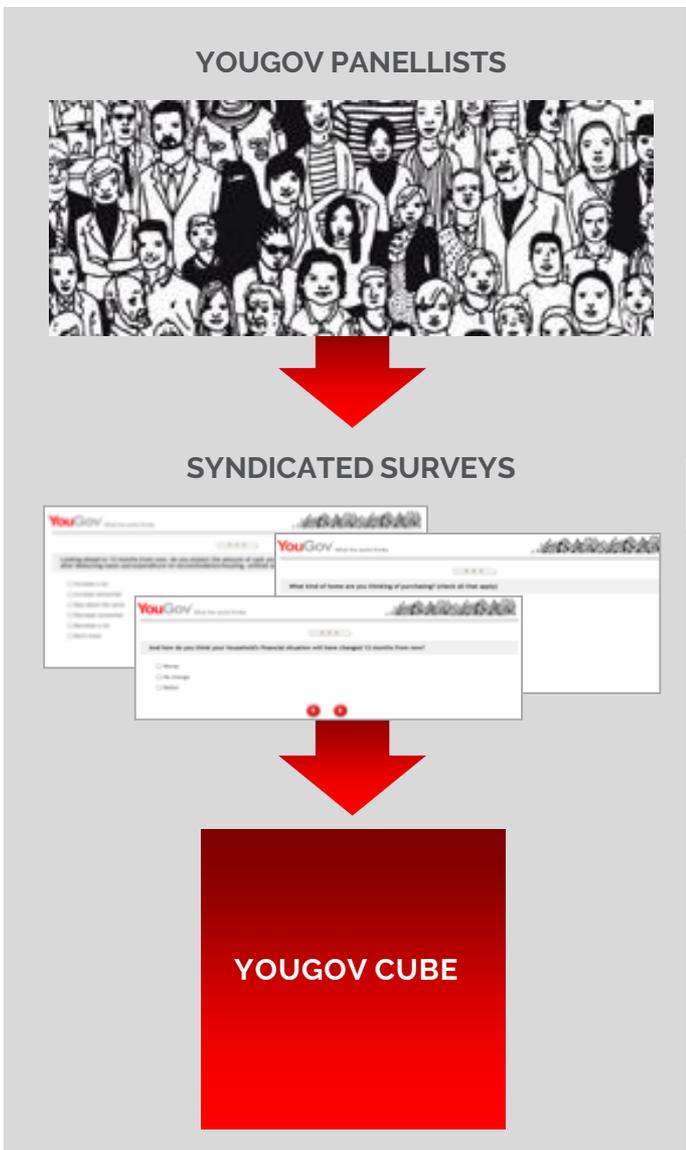


Introducing YouGov BrandIndex

The daily brand perception tracker

YouGov

BrandIndex: what it is and how it works



ONLINE REPORTING TOOL (HOSTED)



EASILY EXPORTABLE DATA

Region Sector Filter Brand	US					
	Internet Sites					
	Gender: Female, Income: \$100K+					
	Google					
	Standard	Proportional	Positive	Negative	Neutral	Total
05-01-2009	65.4	80.2	120	13	30	164
05-04-2009	67.2	81.2	127	13	29	170
05-05-2009	68.2	81.6	131	13	28	172
05-06-2009	67.0	81.2	128	13	30	171
05-07-2009	69.7	81.9	129	13	25	167
05-08-2009	68.5	81.4	126	13	26	165
05-11-2009	69.0	81.6	127	13	25	165



BrandIndex metrics: relevant across all categories and brands

MEDIA METRICS

Aided Brand Awareness:
Are you aware of the brand?

Buzz:
Have you heard anything positive or negative about the brand in the last two weeks?

Attention*:
Positive plus negative buzz

Advertising Awareness:
Have you seen recent advertising?

Word of Mouth (WOM) Exposure
Have you recently spoken about the brand?

BRAND HEALTH METRICS

General Impression:
Do you have a positive or negative view of the brand?

Quality:
Is the brand of good or poor quality, irrespective of price?

Value:
Does the brand offer good or poor value for money?

Corporate Reputation:
Would you be proud or embarrassed to work for this brand?

Index*:
Average of brand health measures

LOWER FUNNEL METRICS

Purchase Consideration & Intent:
Which brands are you considering purchasing? Which most likely?

Customer Status:
Are you a current or former customer, or a prospect?

Satisfaction:
Are you a recently satisfied or dissatisfied customer of the brand?

Recommend:
Would you recommend this brand to a friend or tell them to avoid it?



*Derived metric

A truly unique product

- ✓ Continuous daily data
- ✓ Breadth of coverage: thousands of brands
- ✓ Large daily sample size
- ✓ Panellist profiling (demographics, attitudes, behaviors)
- ✓ Custom “trigger questions” can be inserted into syndicated questionnaire
- ✓ Historical data: 8+ years in several geographies
- ✓ Global platform: common methodology, delivery via online reporting tool

YouGov

BrandIndex provides critical information to help marketers manage their brands

For analysing the effects of your advertising

- *How does advertising impact buzz, consideration and other metrics?*
- *Does my advertising appear to generate WOM? Improve quality? Value? Impression?*
- *How does my campaign (or a competitor's) impact other brands in the category?*

For planning, customer analysis and prospecting

- *Which of my competitors do my customers consider? Which do they patronize?*
- *To which of my competitors have my former customers gone?*
- *Whom do my prospects currently consider? Who do they patronize?*
- *Which of my competitors are rated lowest by their current customers?*

For crisis management

- *Have my customers heard about the crisis? Are they sticking with me or skeptical? Considerers?*
- *What is the impact by consumers who have heard / participated in WOM vs. those who haven't?*

For internal and external communications

- *Claims advertising*
- *CEO talking points*
- *Press releases*
- *Franchisee meetings*

BrandIndex footprint becoming increasingly global: enabling us to attract global clients

- BrandIndex is currently available in 24 markets



Our clients include brands and their agencies

Brands

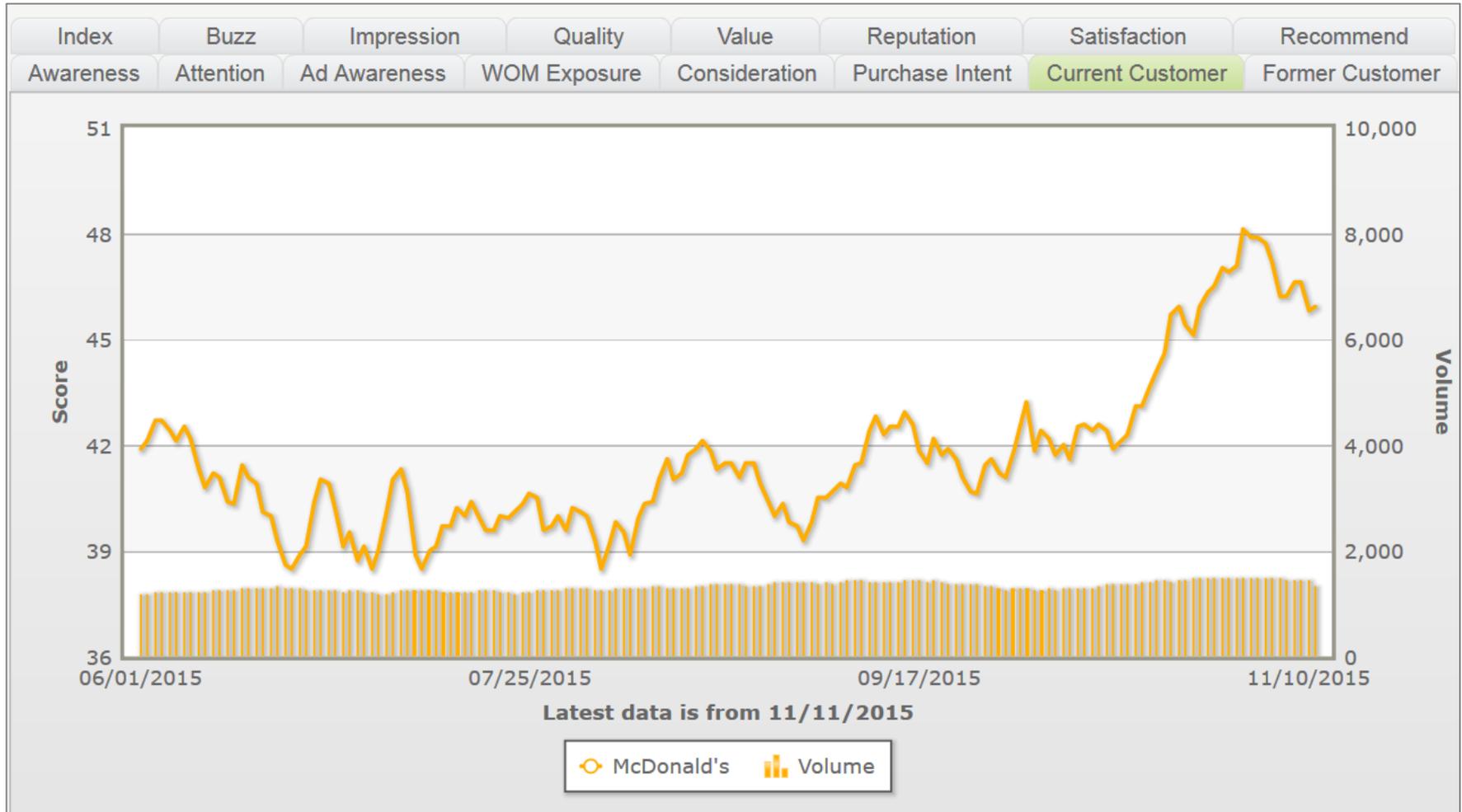


Agencies

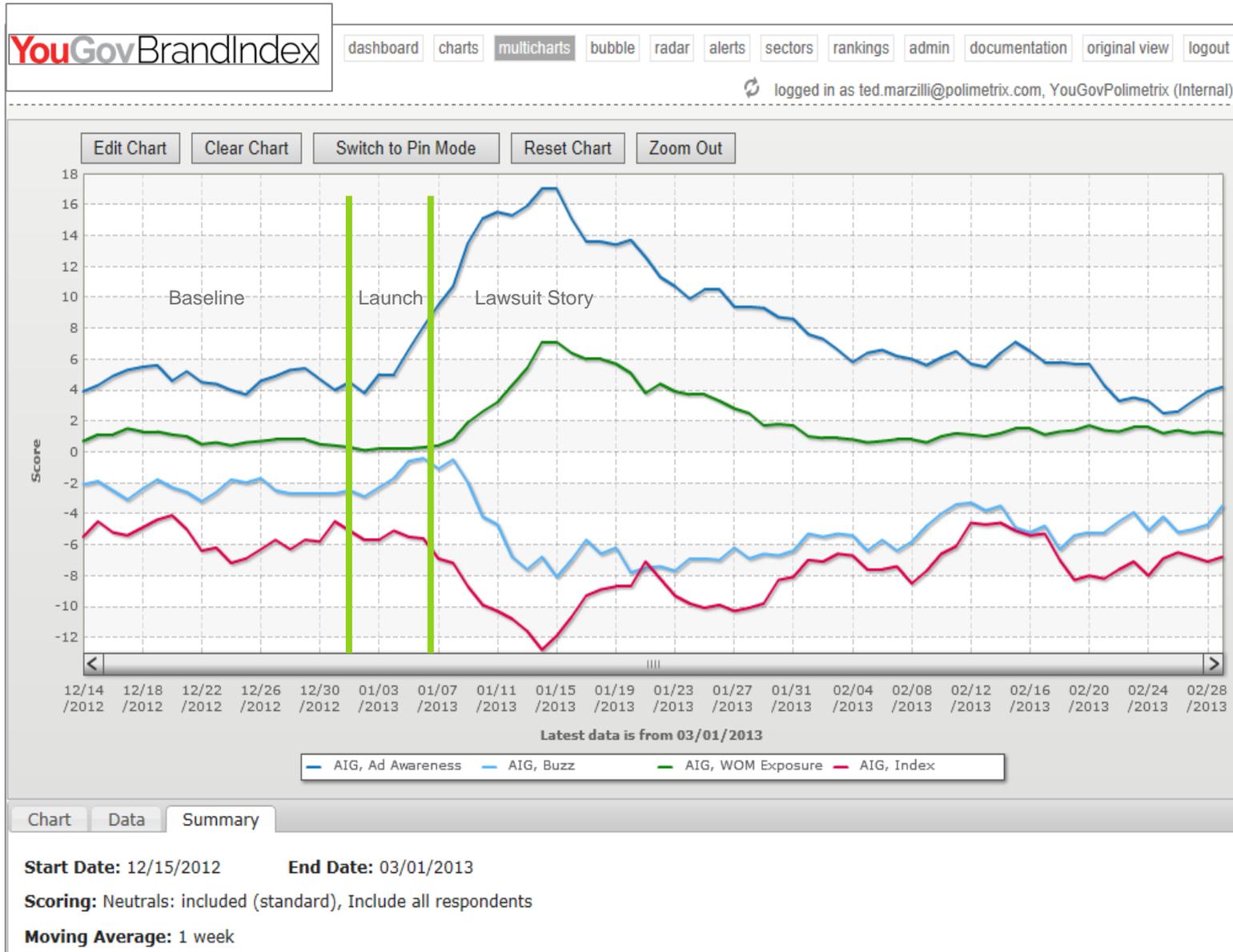


Some Examples

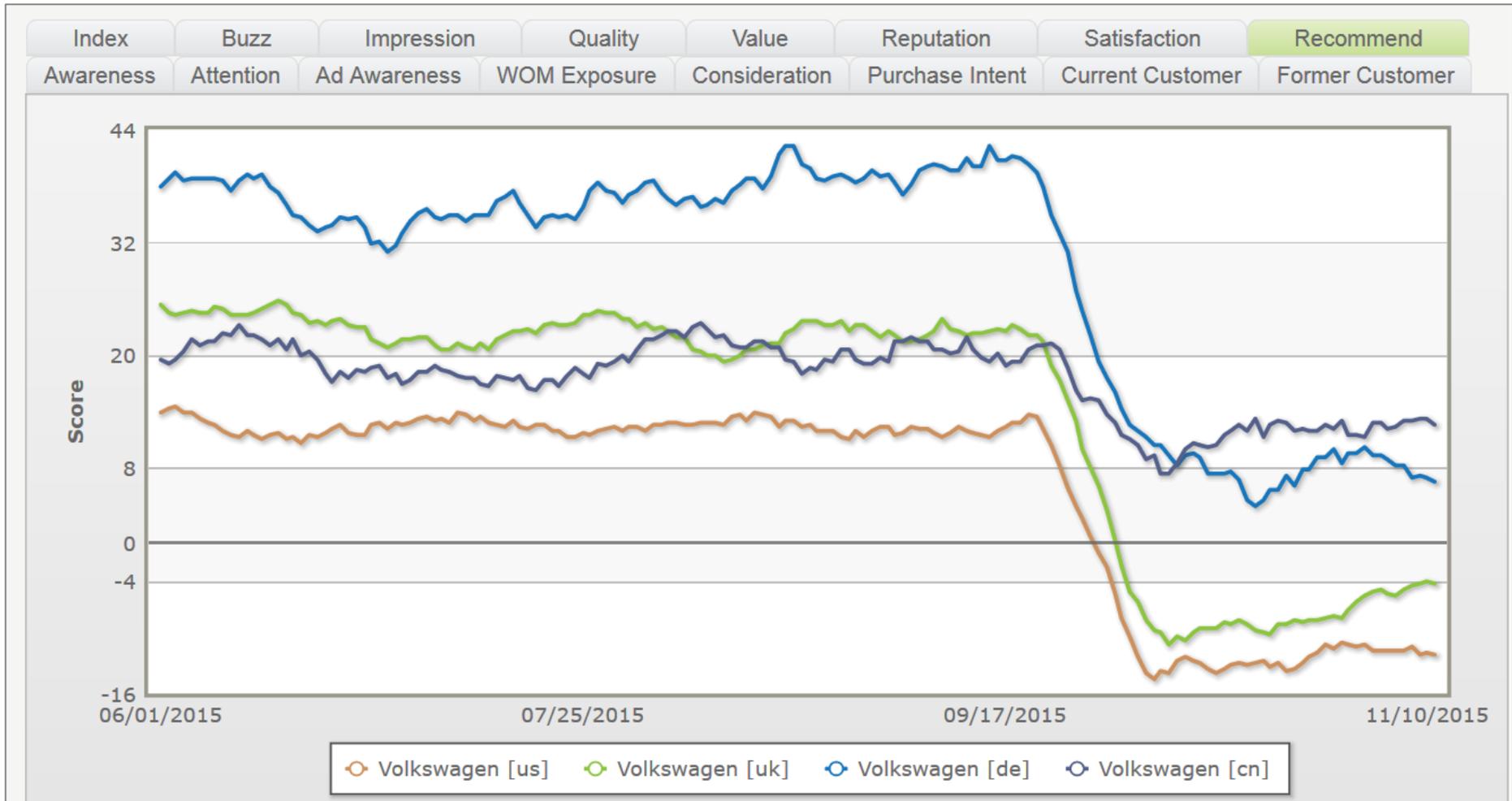
Early impact of all-day breakfast at McDonald's



AIG 'Thank You America' campaign



VW crisis – immediate global read



BrandIndex applied to investment theses

August 21, 2014

Goldman Sachs

COMPANY UPDATE
Constellation Brands (STZ)

Neutral Equity Research

Analysis points to modest impact from Corona Extra bottle recall

What's changed
We continue to monitor consumer perceptions around the impact of STZ's voluntary recall of select Corona packaging. As a reminder, on 8/15/2014 STZ indicated select packages of Corona Extra "may contain small particles of glass". STZ noted that <1% of the bottles may be impacted, however the company is recalling select packages as a precautionary measure. Recent brand metrics indicate a modest negative impact to the Corona brand. Our baseline assumption is for a limited impact to sales trends given 1) no indications of direct consumer incidents, and 2) the relatively limited scale of impacted bottles.

Implications
Consumer awareness of packaging issue gains momentum – YouGov BrandIndex brand awareness scores have increased to the highest level since the first week of August following the recall announcement. Google search trends have coincidentally increased both on an absolute basis and y/y (indicating the increase might not be seasonal). We note that negative purchase intention scores have also increased, indicating potential causality. We believe the impact will be limited in scope given still modest deterioration in purchase intentions, but warrants further monitoring.

Investment Profile

Low High

Growth Growth

Returns * Returns *

Multiple Multiple

Volatility Volatility

Percentile 20th 40th 60th 80th 100th

■ Constellation Brands (STZ)

○ Americas Consumer Group Peer Group Average

* Returns = Return on Capital For a complete description of the investment profile measures please refer to the disclosure section of this document.

Key data Current

Price (\$)	87.46
12 month price target (\$)	97.00
Market cap (\$ mn)	16,762.6
Dividend yield (%)	NM
Net margin (%)	14.3
Debt/capital (%)	54.4

	2/14	2/15E	2/16E	2/17E
Revenue (\$ mn)	4,867.7	6,042.1	6,347.5	6,666.2
EPS (\$)	3.25	4.30	4.84	5.93
P/E (X)	18.3	20.4	18.1	14.4
EV/EBITDA (X)	12.4	13.7	12.3	10.4
ROE (%)	16.4	15.8	15.4	17.4

5/14 8/14E 11/14E 2/15E

citi

31 March 2014 | 31 pages

General Motors Company (GM)

GM Recall Watch (3/31): Apr 1-2 Playbook & New Survey Perceptions

- **What's New?** — After another round of recalls over the weekend and Sunday's House Committee memo, the coming week promises to be eventful for GM with March auto sales due out April 1 and recall-related hearings scheduled for April 1-2.
- **April 1 Hearing Preview** — We read Sunday's House Memo as a modest negative for GM as it suggests (based on a 3/27 Delphi briefing to the Committee) that GM approved the PPAP in Feb-02 even though it didn't meet GM's specifications (nor did the Apr-06 fix). On the flip side, the memo does suggest to us that NHTSA also didn't find justification to open a formal investigation, that GM felt that impacted vehicles would remain operational and that "New" GM appeared more aggressive in pursuing this issue. We expect the hearings to focus on the specs issue (we'll hear GM's side). **GM's defect identification/communication protocols and future changes.**
- **What's the Consumer Thinking? YouGov Brand Survey (Auto Sell-Side 1st)** — To gauge (daily!) changes in consumer perceptions since the recall began we turned to the YouGov BrandIndex, which tracks multiple perception metrics. The YouGov data, analyzed in this report, suggests that key GM perception metrics took a significant hit during the third week of March, but rebounded nicely during this last week. Of course, the rebound came prior to this past weekend's news, but the data does suggest that perceptions can rebound quickly when bad news dissipates. We expect GM's March share to wrap around 17%, flat YoY but lower than the 17.9% LTM. Strong pricing should be an offset & inventory days estimated slightly above avg.

Single solution tied to client workflow



My Customers

My Brand

Coffee break



YouGov's powerful analytics solution: Crunch

Doug Rivers – Chief Scientist



The problem of collaborative analytics

There are several deficiencies with the traditional model:

- It's slow
- Mistakes will be made
- Data are lost or forgotten
- There is no data security
- Big data is too big for normal stats systems

All of your data in one place

- All of your surveys are stored in the cloud and instantly available to any user you have authorised to see the data via a secure login.
- You can find questions in any of your datasets using a powerful search tool. You don't have to worry about losing old data — it's always there.

The screenshot displays the YouGov Datasets interface. At the top, there's a header with the YouGov logo (three colored circles), the word "DATASETS", a search bar, and user information "Help Mike Malecki". Below the header, a list of users is shown on the left: "All", "Alejandro Rivera", "Ben Sully", "Delia Bailey", "Gonzalo Rivero", "Joe Williams", and "Steffen Weiss". The main area shows a table of datasets with columns for "Name" and "Owner".

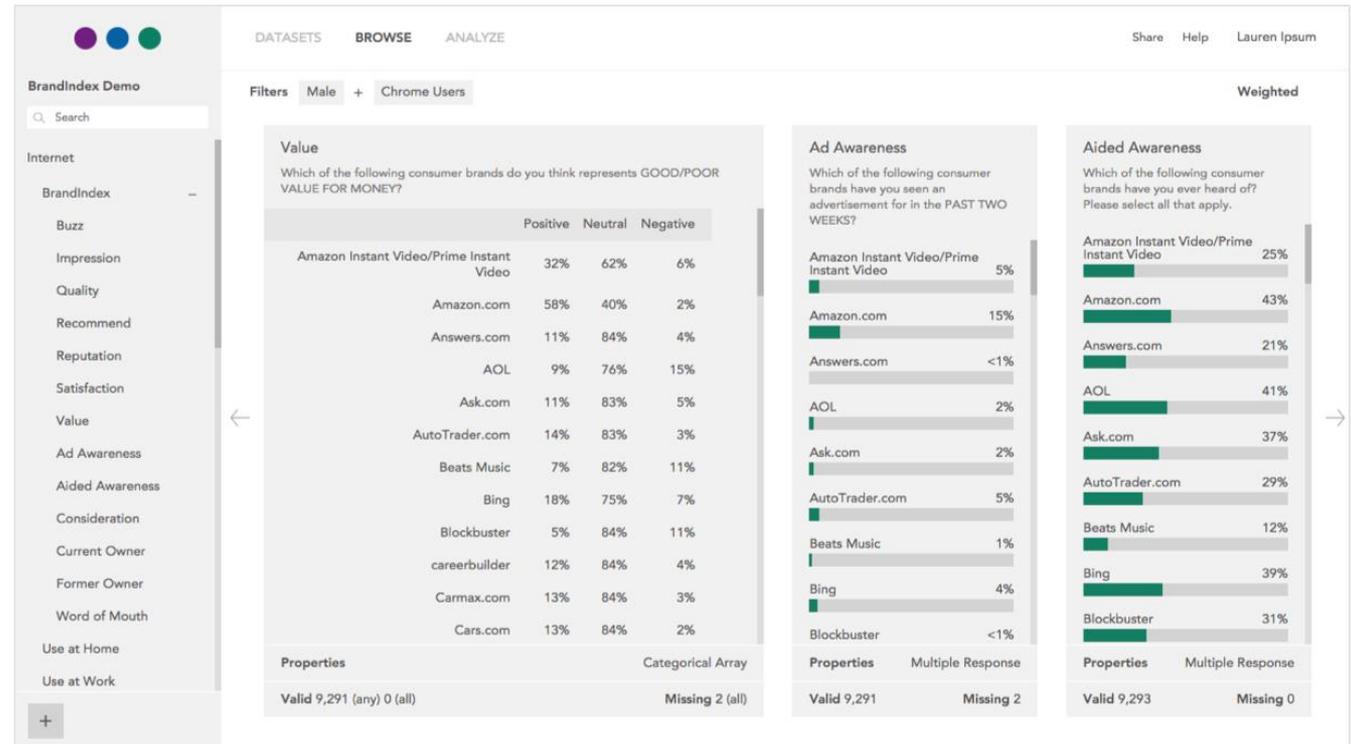
Name	Owner
Android Wearables	Steffen Weiss
Chrome Brand Tracker	Gonzalo Rivero
Crunch Test Demo	Delia Bailey
Profiles US 2015-06-21	Ben Sully

The second screenshot shows a detailed view of the "Crunch Test Demo" dataset. It features a search bar with "smartphone" entered and user information "Help Mike". The content includes several sections:

- Smartphone Apps**: An "app" is an application that you can download onto your mobile device (e.g., [smartphone](#), tablet, etc.). Approxim many apps have you downloaded to your [smartphone](#)?
- Devices Used**: Which, if any, of the following devices do you use to most often browse the internet?
[Smartphone](#) | Desktop computer | Laptop computer | Tablet computer | Standard mobile phone | Other | Don't know | ...
- Mobile Gaming**: Do you, personally, currently play video games on a [smartphone](#), tablet, or other mobile device?
- Newspaper Apps**: How often, if at all, do you use the following news apps on your [smartphone](#) and/or tablet?
- Type**: What kind of cell phone do you have? If you have more than one cell phone, then please think about the one you use
[Smartphone](#) (a mobile phone with a large selection of apps easily available to install, e.g. iPhone) | Standard mobile phone | [C
Not applicable - I don't have a cell phone | No Data

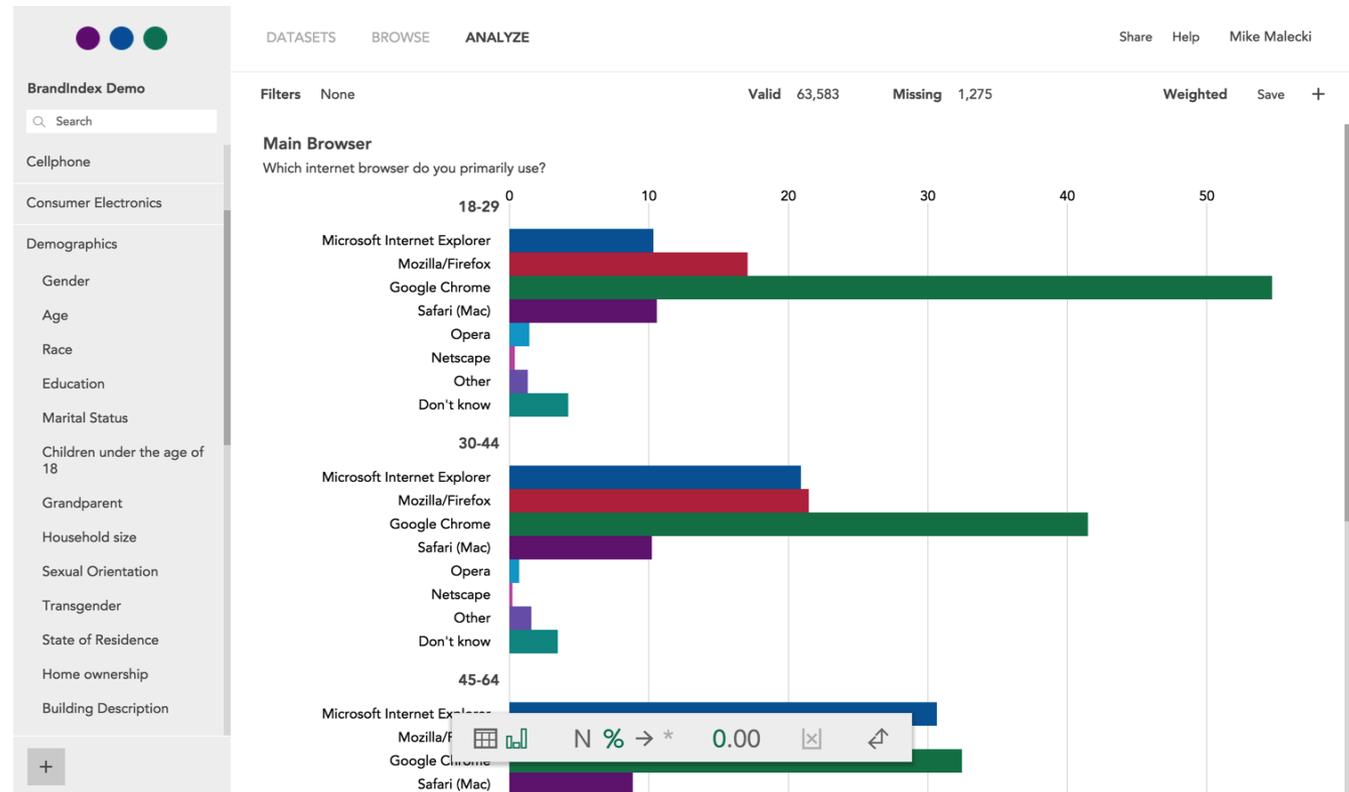
Explore your data

- Your data is organised by topic.
- Click and you can see all of the questions related to a topic that interests you.
- Or just browse through all of your questions.
- Data analysis does not have to be a struggle.



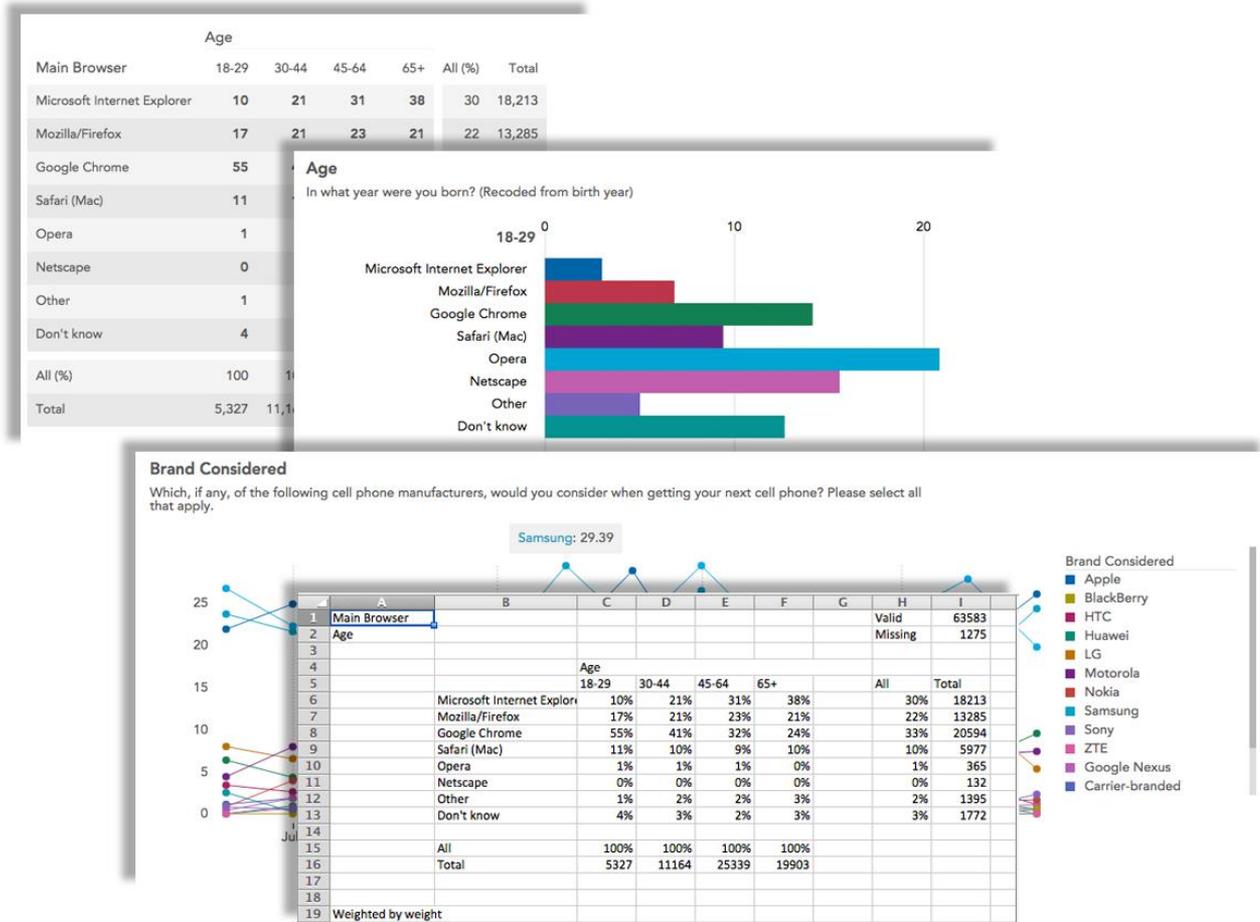
Create complex analyses

- Crunch is easy.
- It uses an intuitive point and click interface.
- No more programming or waiting for a deck of tabs.
- Analytics at the speed of thought.



Have it your way

- Crunch adapts to your workflow.
- Do you want a table or a graph?
- Excel or Powerpoint?
- Share your data and analyses with your team.



Drill down into your data

- Remember when it took a week to redo an analysis for repeat customers or customers in a single region?
- In Crunch you can slice and dice your data interactively.
- Filter your analyses on the fly. It's easy—just select one or more variables to see the analysis on that subset.

The screenshot shows the YouGov Crunch interface. On the left is a sidebar with a search bar and a list of categories: Internet, Technology, Media Consumption, Cable and Satellite TV, Cellphone, Consumer Electronics, Demographics, and Date. The main area is titled 'BrandIndex Demo' and has navigation tabs for 'DATASETS', 'BROWSE', and 'ANALYZE'. A 'Chrome Users' filter is active, showing a list of browser options: Microsoft Internet Explorer, Mozilla/Firefox, Google Chrome (selected), Safari (Mac), Opera, Netscape, Other, and Don't know. A 'Count' of 20,594 of 63,346 (32.51%) is displayed. A large grey box with the text 'Select or drag variable' is overlaid on the right side of the main area. At the bottom, there are 'Save', 'Cancel', and 'Delete' buttons.

Create custom segmentations

- It's easy to create segments from variables in your dataset.
- Drag the variables you want to use. Select the categories that belong to each segment.
- Presto and they are ready to use in any of your analyses.

The screenshot displays the YouGov segmentation tool interface. On the left is a sidebar with a search bar and a list of categories: Internet, Technology, Media Consumption, Cable and Satellite TV, Cellphone, Consumer Electronics, Demographics (Gender, Age, Race, Education, Marital Status, Children under the age of 18), and a plus sign for more. The main area is titled 'Segmentation' and shows a workflow for creating a segment. The current segment is 'Young men' with a count of 2,193 of 63,346 (3.46%). The criteria are 'Gender is Male AND Age is 18-29'. Below this, two selection panels are shown: 'Gender' with 'Male' selected (31,067 of 63,346, 49.04%) and 'Age' with '18-29' selected (5,713 of 63,346, 9.02%). At the bottom, an 'Add Category' section shows 'Other' with a count of 59,826 of 64,858, marked as 'missing'. 'Save' and 'Cancel' buttons are at the bottom.

Segmentation	Count	Criteria	Status
Young women	3,519 of 64,858	Gender is Female AND Age is 18-29	valid
Young men	2,193 of 63,346 (3.46%)	Gender is Male AND Age is 18-29	valid

Variable	Category	Count	Percentage
Gender	Male	31,067	49.04%
	Female		
	No Data		
	Count		31,067 of 63,346
Age	18-29	5,713	9.02%
	30-44		
	45-64		
	65+		
	Count		5,713 of 63,346

Category	Count	Percentage	Status
Other	59,826		missing

The technology

- Being used today by some of YouGov's largest customers for tracking studies (Google, ITV)
- General purpose analytics application: fills a niche between legacy applications (SPSS, SAS) and “big data” products—***instant, easy, collaborative***
- Crunch is based on modern open source NoSQL database technologies
- Instead of moving data over the network, computations are moved to where the data are stored
- Instant (< 200ms) queries for queries with under a million rows

YouGov Omnibus

Ray Martin – Omnibus CEO



Definitions of our Custom Research Solutions

1. Custom Research: a research study including customised deliverables
2. Field & Tab: a study to a niche/specific sample requiring standard and templated deliverables
3. Omnibus: a multi-client survey on a wide range of subjects, run on a regular basis

What is the YouGov USP?

- ✓ Speed
- ✓ Accuracy
- ✓ Media coverage
- ✓ Portfolio of Custom Research products
- ✓ Skilled researcher support
- ✓ Global research offering

Major opportunities for growth

- Specialist Omnibus services
- International
- Field & Tab services
- Cube data
- Automated outputs

YouGov Omnibus Client Testimonial

Video



Collaborative Insights tool

- Our new platform for clients and researchers to design surveys more efficiently
- Initially available in Asia Pac and Nordics

Collaborative Insights tool

The screenshot shows the YouGov dashboard for a survey titled "TestingSurvey_16Nov". The user is logged in as "andy.wong". The dashboard features a search bar with the placeholder text "Press Enter to search in survey". A red button labeled "Submit to Gryphon" is visible, along with "Preview" and "Save" buttons. A "Collapse Content Options" dropdown is on the left, and navigation links for "Prev", "First", "1", "Last", and "Next" are on the right. The main content area displays a welcome message: "Welcome you can start building your questionnaire!". Below this, there are two large blue buttons: "Add Question" and "Upload CSV", separated by a dashed line with the text "OR" in the center. A link "Learn More" is provided below the "Upload CSV" button. At the bottom, there is a link "Go" for first-time users. The YouGov logo is in the bottom right corner of the dashboard.

Collaborative Insights tool

The screenshot displays the YouGov Collaborative Insights tool interface. At the top, the YouGov logo is on the left, followed by a breadcrumb trail: DASHBOARD > TestingSurvey_16Nov. On the right, there are navigation elements for 'US', a user profile for 'andy.wong', and a menu icon. Below the header is a search bar with the text 'Press Enter to search in survey'. To the right of the search bar are three buttons: 'Submit to Gryphon' (highlighted in red), a refresh icon, and 'Preview' and 'Save' buttons with dropdown arrows. A tooltip 'Synchronize with Gryphon' is visible over the refresh icon. Below the search bar is a 'Collapse Content Options' dropdown and a pagination control showing '1' of several pages. The main content area is titled 'PAGE 2' and shows a question configuration screen for 'Q2'. The question is 'What is your favorite sports? (Top 2)'. It is marked as 'Required' (checked) and 'Randomize' (unchecked). Below the question are five radio button options: '1 Baseball', '2 Basketball', '3 Football', '4 Tennis', and '5 Other'. The 'Other' option has 'Fixed' and 'Exclude' buttons next to it. At the bottom left of the question area are icons for a document and a speech bubble, and a 'DISPLAY QUESTION' button. At the bottom right is a link icon.

Collaborative Insights tool

Advantages:

- Minimal training required
- Multiple users can access surveys
- Speed to field
- Questionnaire library
- Moving towards a self-service offering

The new world of research

Andy Morris – Chief Innovation Officer



Online Purchase Journey

Video



Combining all of this...

Traditional Survey

YouGov

Imagine that you were looking for a job for advising a friend looking for a job. Which of the following companies would you be PROUD TO WORK FOR? (Imagine you, for your friend) were applying for the same sort of role at the following companies that you currently have or would apply for.

Please select all that apply.

Shop n Save	7-Eleven	Farway	Albermarle	Mejser
Trader Joe's	Aldi	Stoo & Shoo	Publix	Wegman's
Safeway	Giant	Pathmark	Whole Foods	Kroger

YouGov® Online

Chapel Hill, NC
Carolina Rebellion
The Miami County Republic
Orem, UT
HEINLEIN GLORY ROAD
Rugby Union
Your World with Neil Cavuto
Finnle and Infinite Games
James Carse
How the Garcia Girls Lost Their Accents
doublemint Player



Social Media



Passive Tracking



...changes the face of research

Run a Segmentation



Cruise fanatics



Young fun-seekers



Tempted first timers



Colour the segmentation: "Tempted first-timers"



Demographics and Lifestyles

Female
Midwest and Westerner
Low to middle income
Democrat
Associate or Partner



Attitudes and Opinions

I have never left the Country

I like to have the radio on in the background

I like ads with my favorite stars

I enjoy above all a beach vacation



Brand Usage and Perceptions



Banks
Chase
Bank of America
Wells Fargo

Grocery Store
Kroger
Aldi
Publix

Hotels
Holiday Inn Express
Best Western
Holiday Inn



Media Consumption



USA Today
Wall Street Journal
New York Times



ABC
CBS
NBC



Online and Mobile Behavior

Top 3 Apps



Social Media Engagement



Facebook Page Liked
Walmart
Amazon.com
InboxDollars



Twitter handles followed
Aaronpaul_8
Pink
Kathygriffin
batemanjason

Test new products aimed at “Tempted First Timers”

	Like the concept	Likely to buy	Average spend amount	Ranking of options
Nassau and back	31%	23%	\$240	4
Discover cruising	58%	41%	\$310	1
Two days on the Keys	61%	39%	\$180	2
West Coast hopping	44%	28%	\$380	3

**All dummy data*

Plan the media campaign for 'Discover Cruising'

TV shows



Magazines



Websites



Programmatic



YouGov

Track the success through BrandIndex

Carnival Cruises Buzz



Adapt using Omnibus/Collaborative Insights

- The campaign has attracted buzz, is reaching the target market and incoming calls are up but they aren't converting into sales of the 'Discover Cruising' product
- Carnival return to the YouGov Cube, instantly identify the target market again and hone in on people whose purchase intent has gone up but have not become customers
- They send these people a short survey to understand lack of conversion
- The dates they are offering don't match when the target group want to go on holiday
- Easy fix – sales start to take-off

What's next? Bigger, better, faster, easier

- The combination of custom research and products connected to each other and to the ever-expanding YouGov Cube is unprecedented and unparalleled
- It is all possible today but we must stay ahead of the game:
 - Greater amounts of data
 - More data streams
 - Next stage of Crunch
 - Collaborative Insights
 - Greater global footprint – YouGov Profiles launched in China

Closing remarks and Q&A

Stephan Shakespeare – Chief Executive Officer



Closing remarks

We are increasingly a data technology company:

- Technology as a means of collecting and organising data to understand markets
- Combining expertise and industry experience with hard science
- Putting the human experience, and the human desire to share information, at the heart of our work

Closing remarks

- We've built the infrastructure of a globally scaleable and integrated data technology company
- We are increasing sales of higher margin data products while transforming custom research
- Answering the central challenge for our clients: not just collecting data, but connecting data



YouGov

Thank you.

Questions?



YouGov



YouGov

Don't Just Collect Data. Connect Data.