YouGov Capital Markets Day

17 November 2015

YouGov®

Agenda
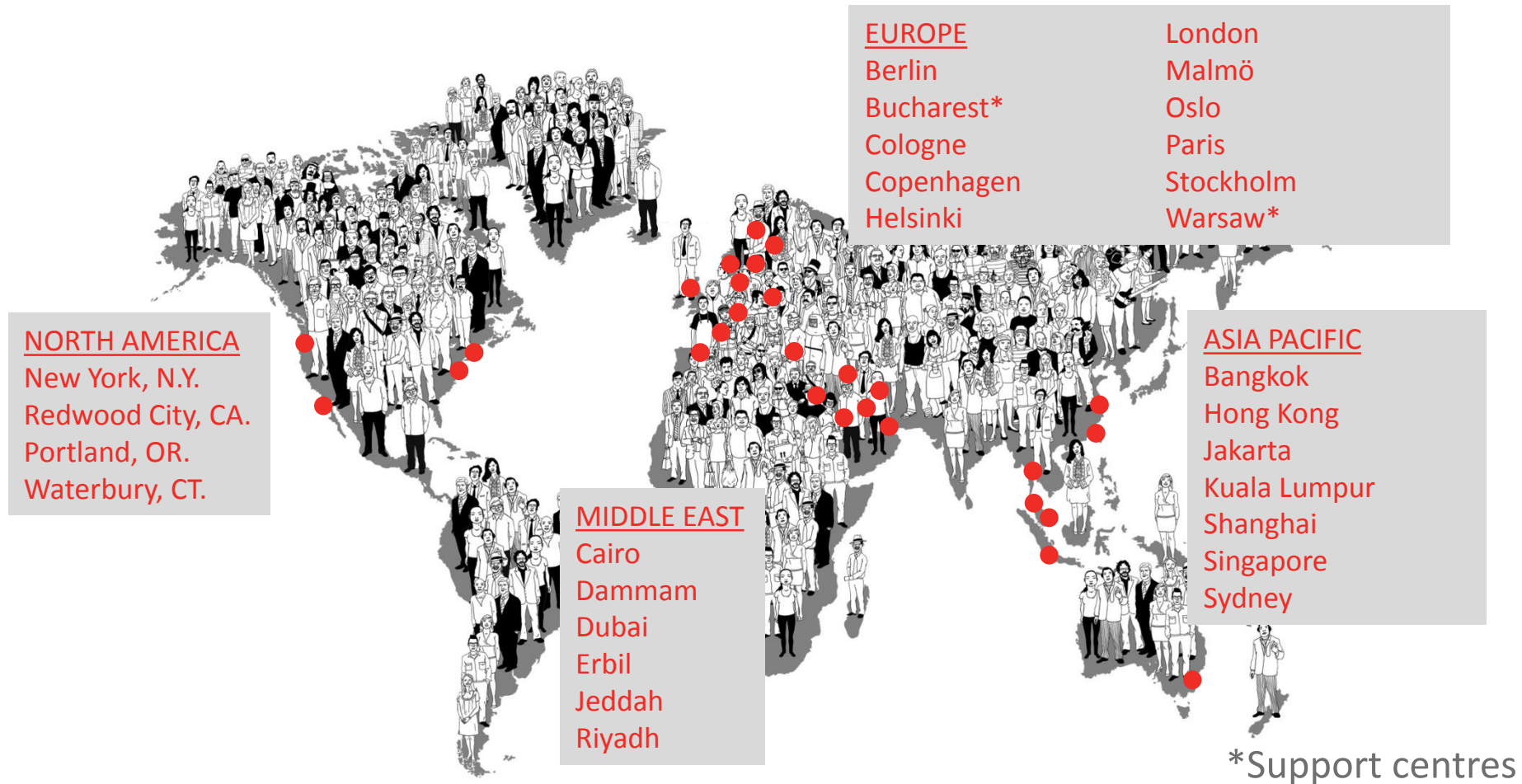
3.00pm	Welcome and Overview – Stephan Shakespeare, CEO
3.20pm	YouGov Online – Freddie Sayers, Chief Digital Officer
3.40pm	YouGov Profiles – Alex McIntosh, UK CEO
4.00pm	YouGov BrandIndex – Ted Marzilli, BrandIndex CEO
4.20pm	Coffee break
4.30pm	Crunch – Doug Rivers, Chief Scientist
4.40pm	YouGov Omnibus – 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

YouGov

Welcome and Overview

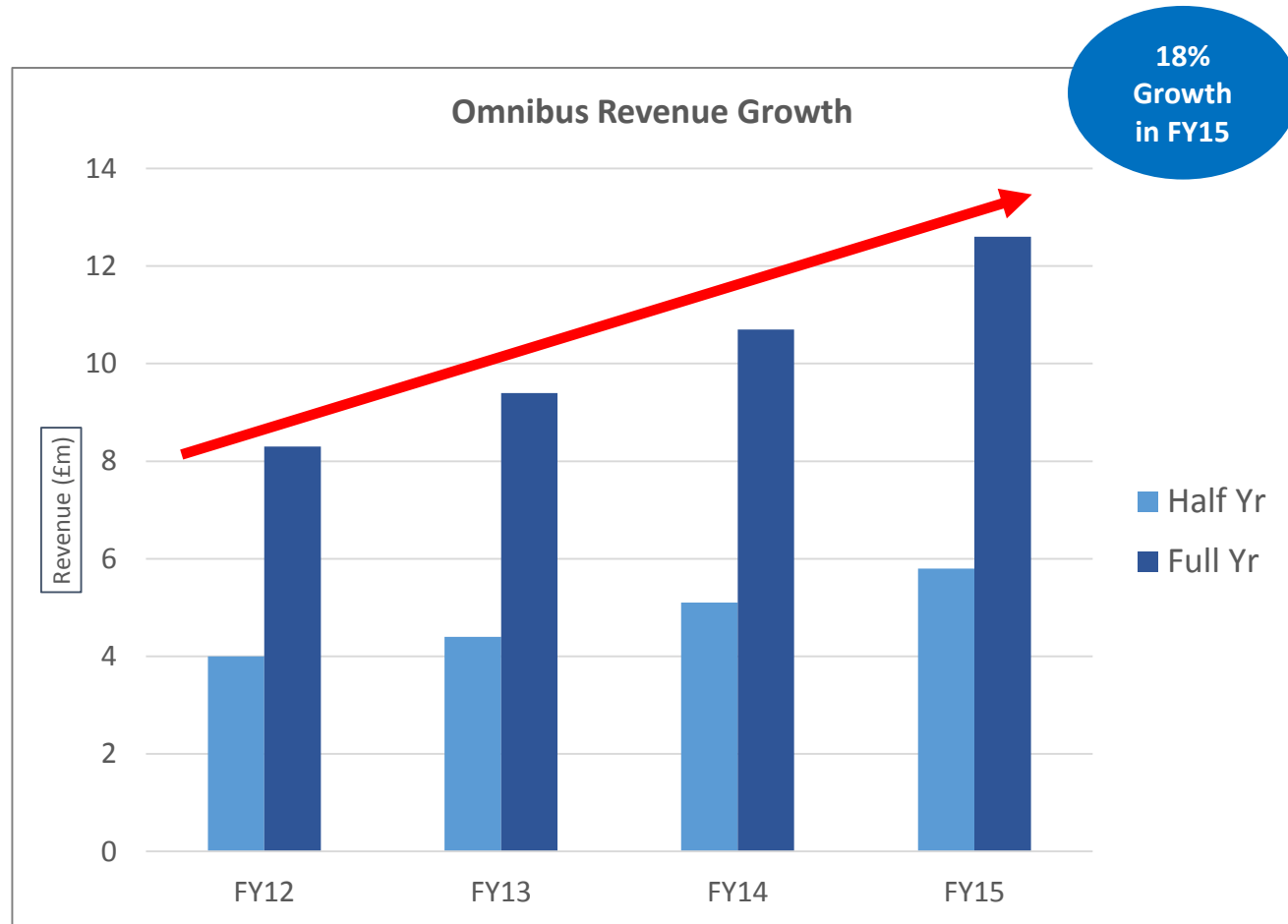*Stephan Shakespeare – Chief Executive Officer*

YouGov's geographic footprint

EUROPE
Berlin   London
Bucharest*   Malmö
Cologne   Oslo
Copenhagen   Paris
Helsinki   Stockholm
     Warsaw*

NORTH AMERICA
New York, N.Y.
Redwood City, CA.
Portland, OR.
Waterbury, CT.

MIDDLE EAST
Cairo
Dammam
Dubai
Erbil
Jeddah
Riyadh

ASIA PACIFIC
Bangkok
Hong Kong
Jakarta
Kuala Lumpur
Shanghai
Singapore
Sydney

*Support centres

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

YouGovOmnibus

- 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

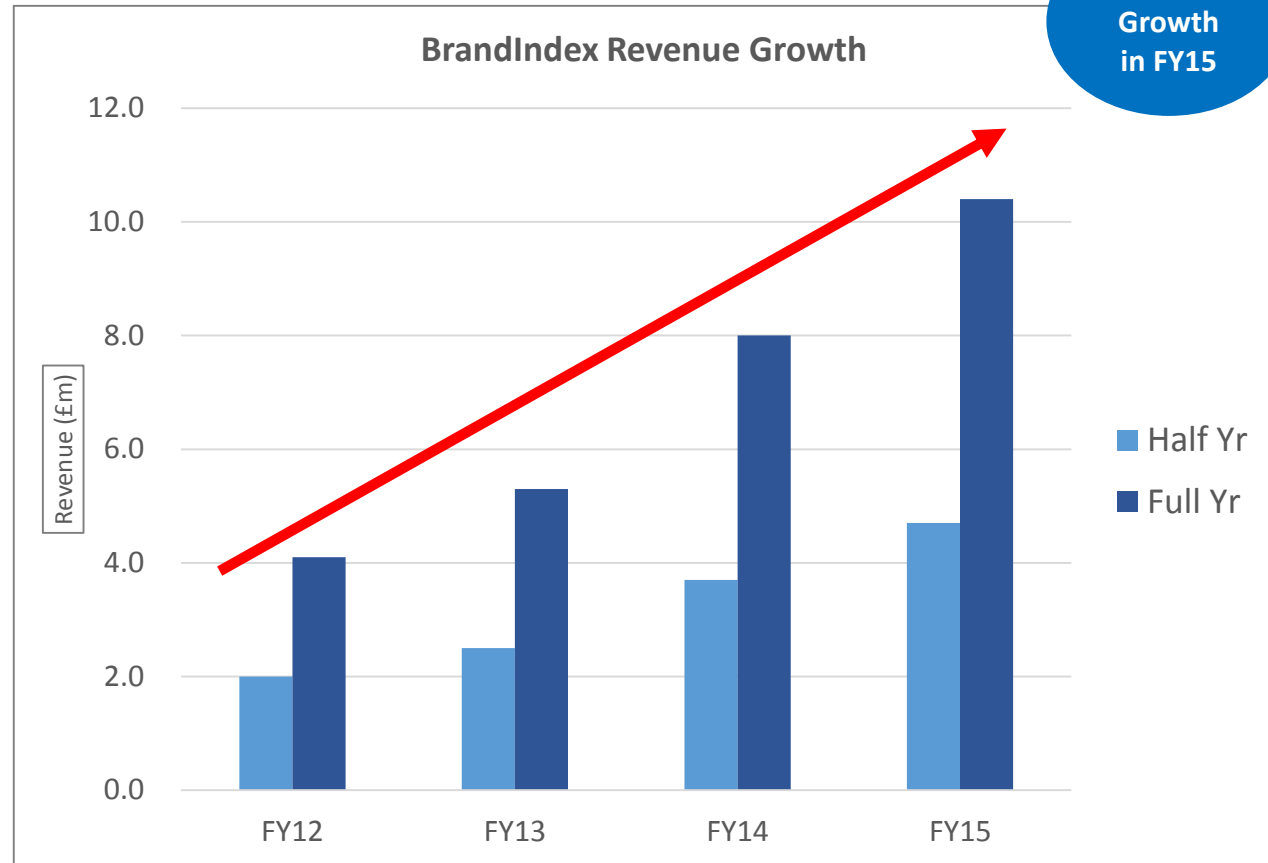**Omnibus Revenue Growth**

18% Growth in FY15

Revenue (£m)

- Half Yr
- Full Yr

	Half Yr	Full Yr
FY12	4.0	8.3
FY13	4.4	9.4
FY14	5.1	10.7
FY15	5.8	12.6

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YouGovBrandIndex

- ➤ 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

30% Growth in FY15

BrandIndex Revenue Growth

Revenue (£m)

Legend:
- Half Yr
- Full Yr

X-axis: FY12, FY13, FY14, FY15
Y-axis: 0.0 to 12.0

What is YouGov's new invention?

The YouGov Cube

- Surveys, BrandIndex, Trackers

- Opigram, long-tail self-entered data

- Digital tracking, social media

TIME

VARIABLES

PANELLISTS
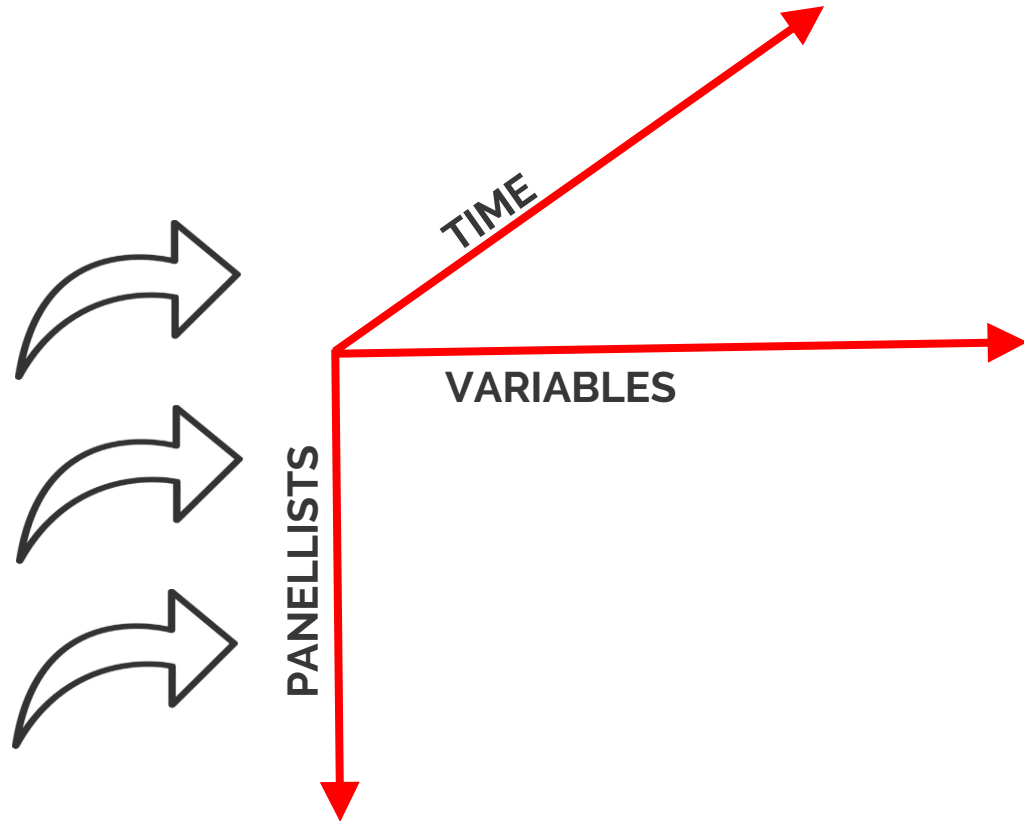
YouGov

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
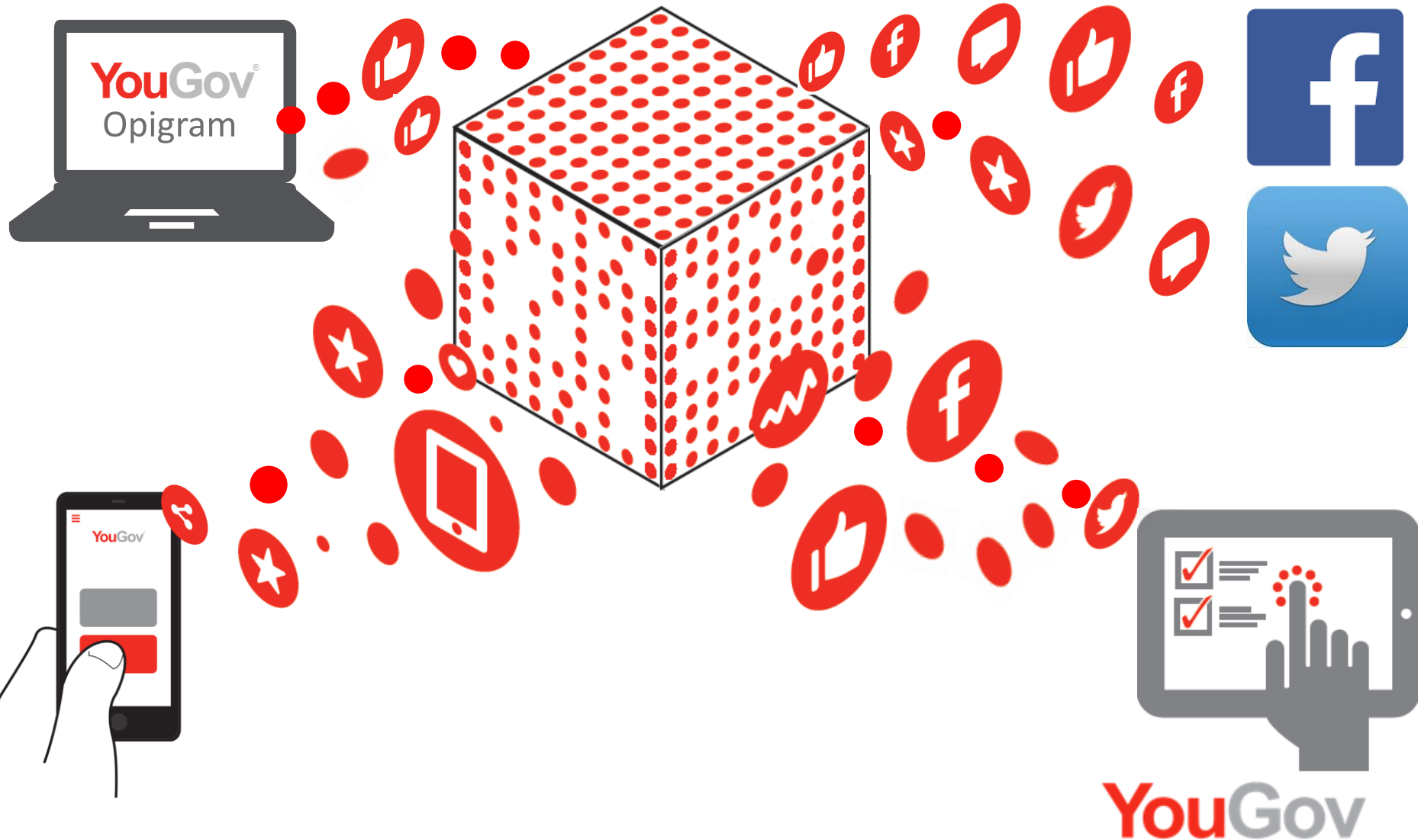
Crunch (easy-to-use advanced analytics tool)

Combining profiles of 5003 Doctor Who viewers

Doctor Who viewers

DEMOGRAPHICS

- GENDER: MALE +
- AGE: 18-24 +
- SOCIAL GRADE: C2DE +

TOP REGIONS +

- CENTRAL SCOTLAND
- NORTHERN SCOTLAND
- WALES AND AVON
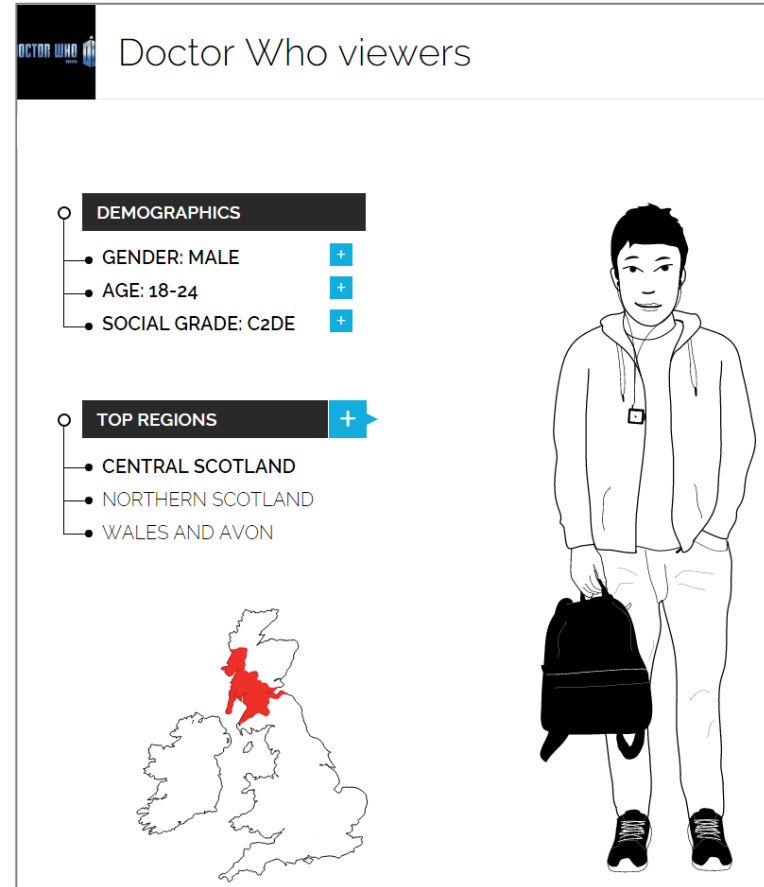
YouGov

Giving a granular & holistic view of the panellist

Mobile

Top entertainment apps …
YouTube
Google Music
BBC iPlayer
SoundCloud
Netflix

Visits Vevo daily on YouTube during the day

Brands

Positive impression of…
Heinz
Cadbury
Boots
Dyson
Walkers

Searched online for 'holidays to Greece and Turkey'

TV

Recently watched…
Casualty
Being Human
Family Guy
The Big Bang Theory

'Pins' this to Pinterest

Twitter

Top journalists followed…
@CaitlinMoran
@gracedent
@GilesCoren
@DAaronovitch

Searches Groupon and Wowcher for 'spa break' deals…

Visits eBay daily

Addicted

A 360° View of 'Polly'

Female

33 Years Old

Earns £40,000 to £44,999 per year

Lives in Oxford

Jack 2 FM

Owns an iPhone on EE

Personality

Describes self as…
Easy-going
Dependable
Compassionate
Funny

Facebook

Magazines 'liked'…
Company
Full House
Good House
Beautiful
OK!

Heavily used #24LAD hash tag on Twitter

Heavily exposed to HSBC online banners

Websites

Most visited news sites…
dailymail.co.uk
theguardian.com
telegraph.co.uk
mirror.co.uk

Favourite topics…
Celebrities
Fashion
Weddings

Long dwell time on Good House 'Biscuit Week' article

John Mayer a current favourite

Ecommerce

Products purchased on Amazon…
DSLR camera
Roman costume
Grease on DVD

Regularly shops at

And orders an online shop every 3 weeks for a Saturday morning

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

a) <u>Understanding</u>: helping brands and organisations to understand their customers and stakeholders in depth and holistically

b) <u>Marketing</u>: identifying target groups, planning and implementing campaigns

c) <u>Continuous monitoring</u>: 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

YouGov

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

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...

YouGov

Can YouGov be scientific and still compete online?

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

?

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

Commenting on news
GAWKER
THE HUFFINGTON POST
Mail Online

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

Rate & Review
- yelp
- tripadvisor
- review centre
- ciao!

Recommendations
- goodreads
- hunch livestar
- amazon

Social Media
- facebook
- twitter

Opinion Networks
- STATE
- OPINSY Every Opinion Counts.
- Amen.
- thumb Instant opinions.

Commenting on news
- GAWKER
- THE HUFFINGTON POST
- Mail Online
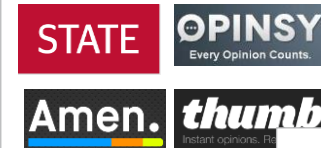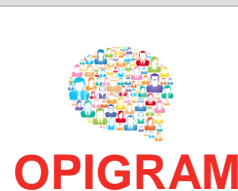
Instead of full-length surveys, Opigram constructs a never-ending 'feed' for people: a constant conversation
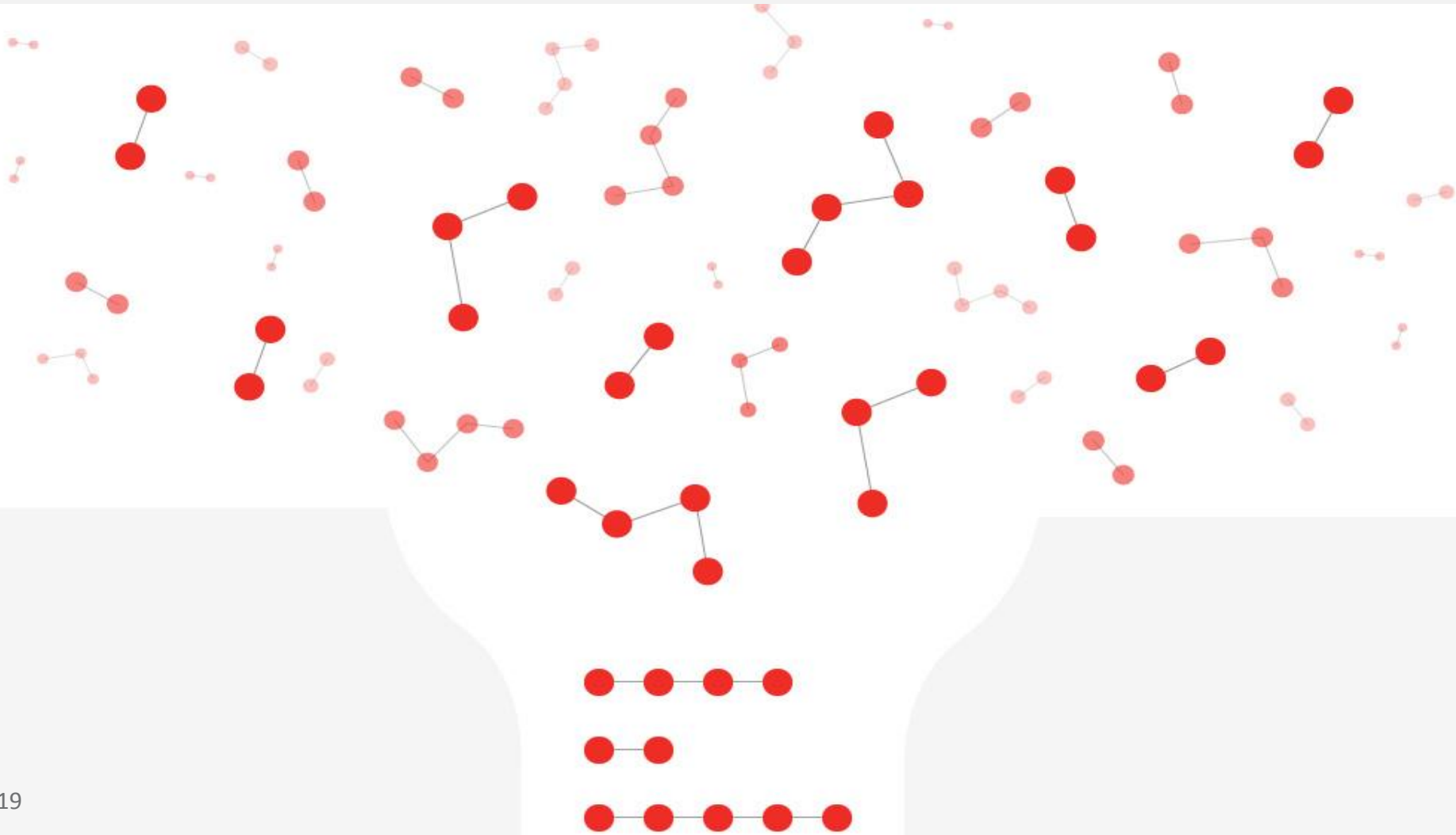
Your feed is a fun survey that you can control...

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

What I think
What I buy
What I read
My Interests
My personality
What I do
My causes
My books
My movies
My music
My brands
My TV shows
My technology
My places

YouGov

Opigram is now one of our main data collection platforms

Source of Data Points (UK)

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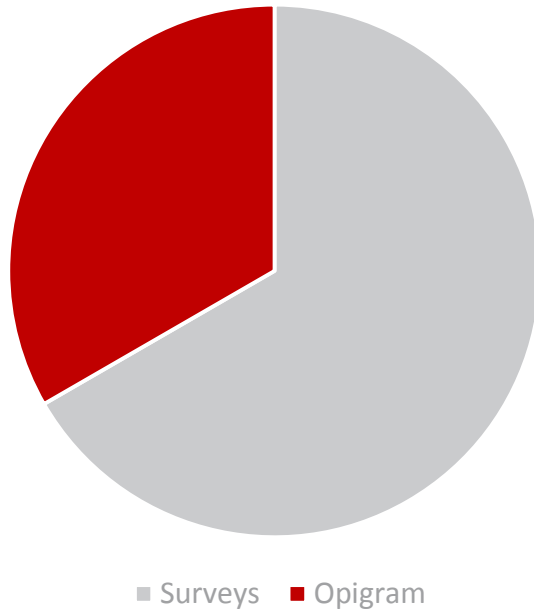
➢ In the UK, approximately one-third of the data we collect is now collected via Opigram

YouGov

What next?

Our online offer: reasons to take part
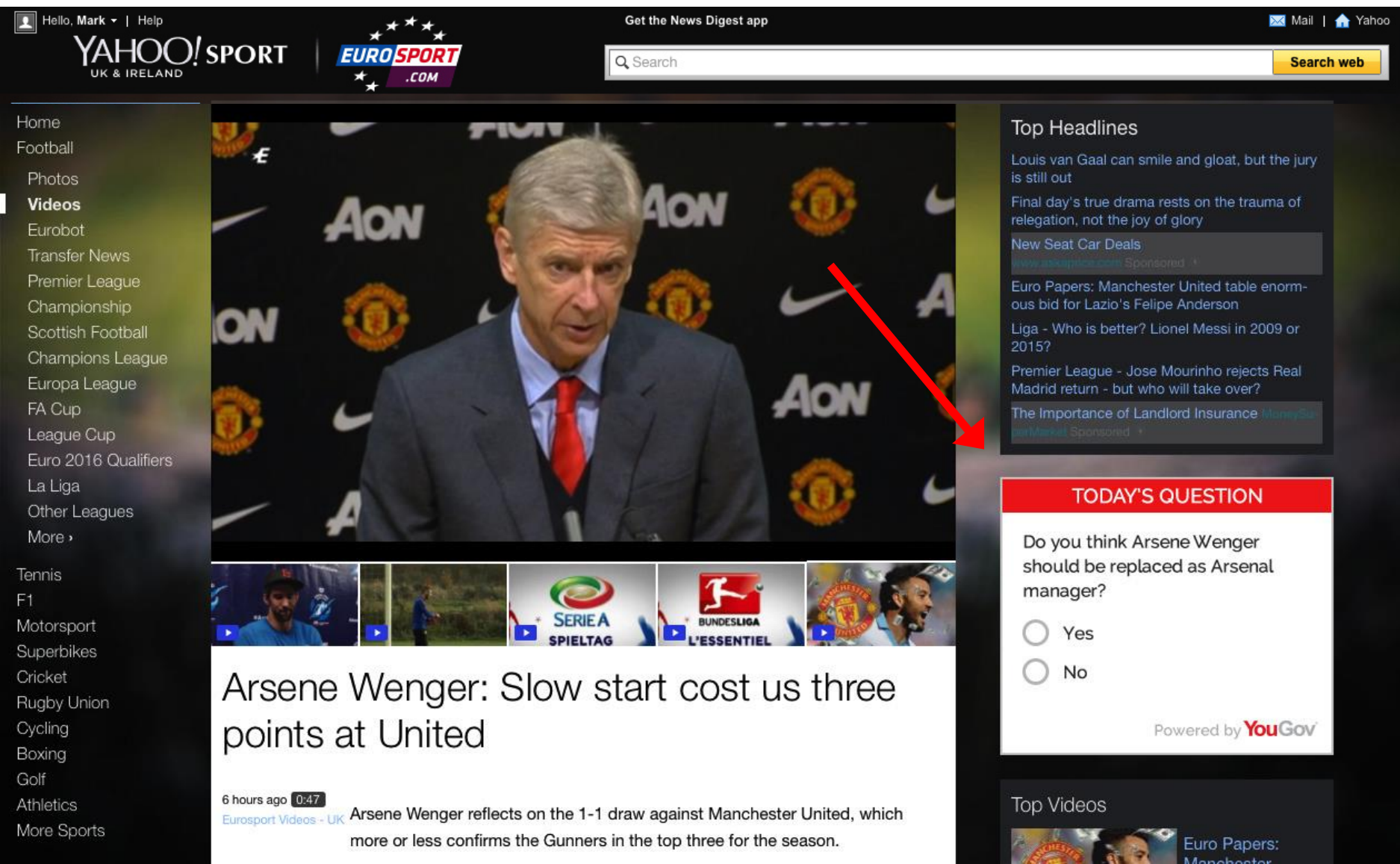
➢ <u>Interest</u>: stimulating, important questions

➢ <u>Social</u>: define yourself in the community

➢ <u>Rewards</u>: earn money and prizes

YouGov

1. Make participation easier with native YouGov app

- Daily questions

- Fill in profile

- Notifications to surveys
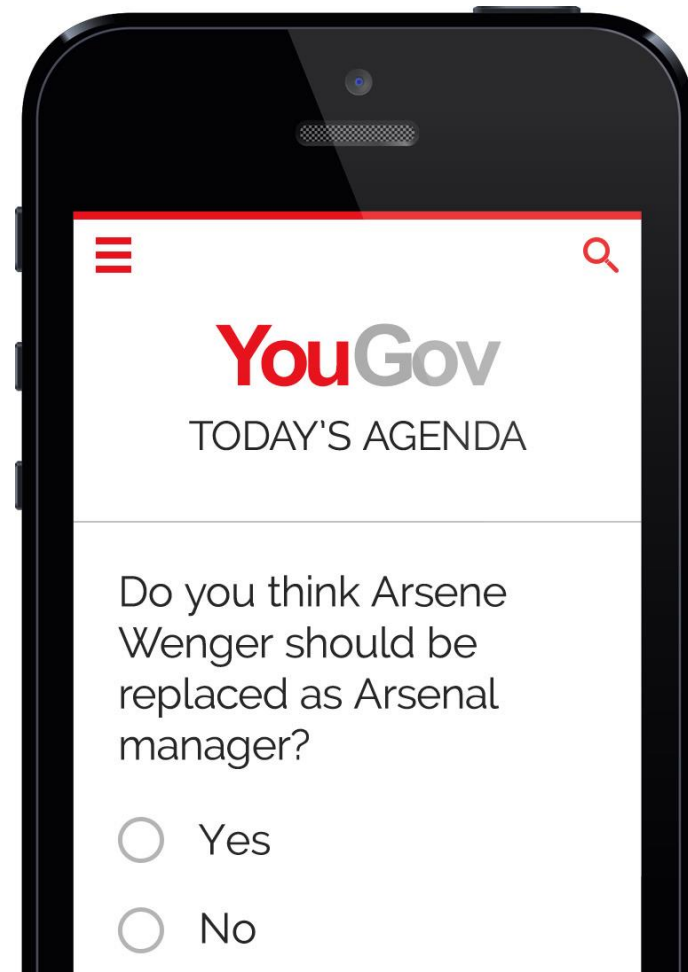
2. Expand reach across third party websites

Bringing together our audiences

YouGov can be seen as a single web <u>application</u>
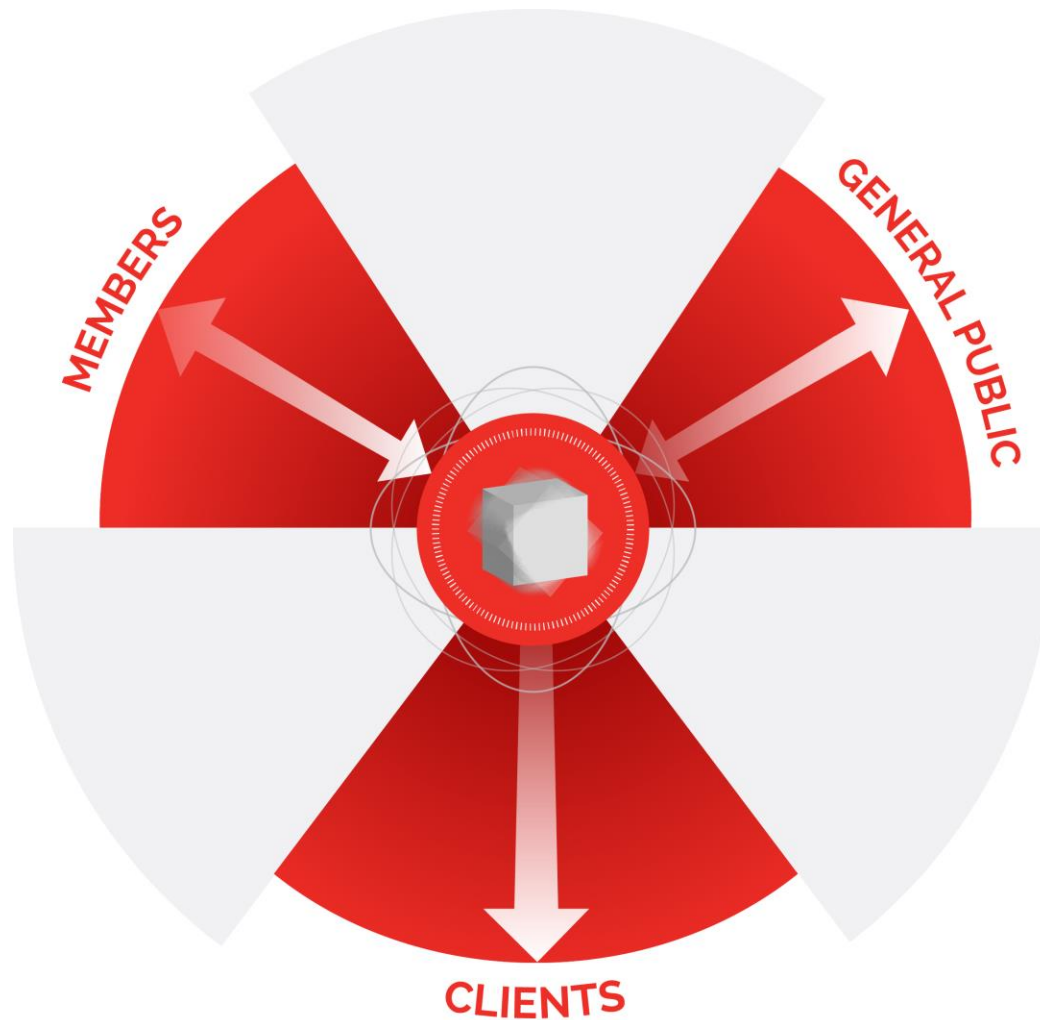
In today's world, B2B clients expect the same level of User Experience they are used to as consumers

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

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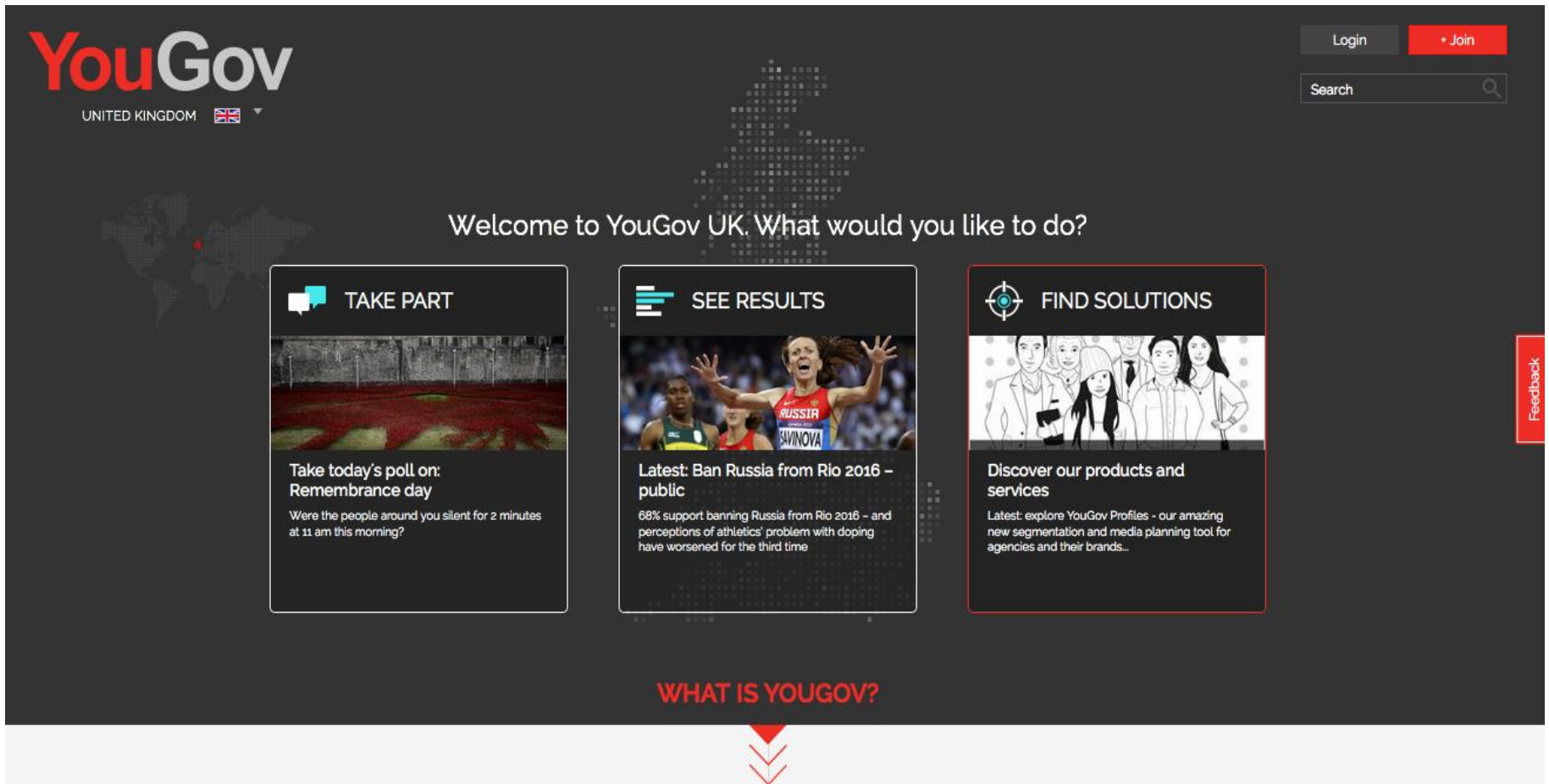
YouGov Profiles

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

YouGov

To address these needs, we launched YouGov Profiles

Our segmentation and media planning product for agencies and brands

People who shop at Ocado

DEMOGRAPHICS
- GENDER: FEMALE +
- AGE: 25-39 +
- SOCIAL GRADE: ABC1 +

TOP REGIONS +
- LONDON
- SOUTH COAST
- MIDLANDS

- 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.

YouGov

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

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

YouGov BrandIndex

Ted Marzilli – CEO, BrandIndex

YouGov®
What the world thinks

Introducing YouGov BrandIndex

The daily brand perception tracker

YouGov

BrandIndex: what it is and how it works

YOUGOV PANELLISTS

SYNDICATED SURVEYS

YOUGOV CUBE
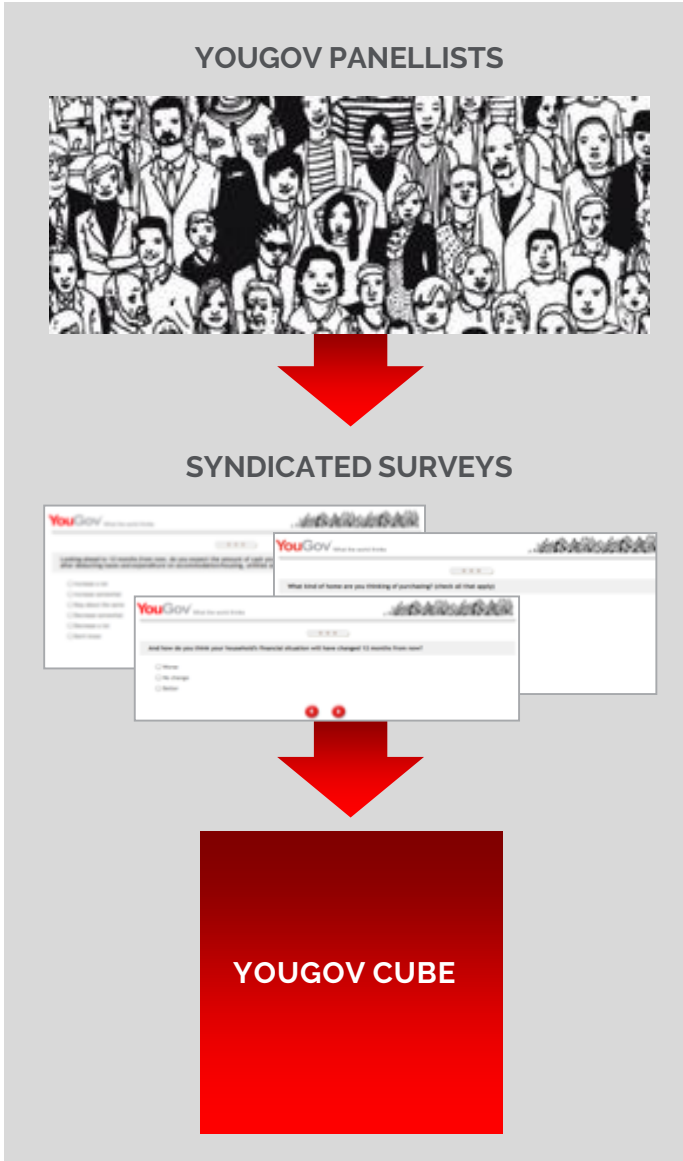
ONLINE REPORTING TOOL (HOSTED)

EASILY EXPORTABLE DATA

Region	US					
Sector	Internet Sites					
Filter	Gender: Female, Income: $100K+					
Brand	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

YouGov

BrandIndex metrics: relevant across all categories and brands

| MEDIA METRICS | BRAND HEALTH METRICS | LOWER FUNNEL 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?

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

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

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YouGov

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
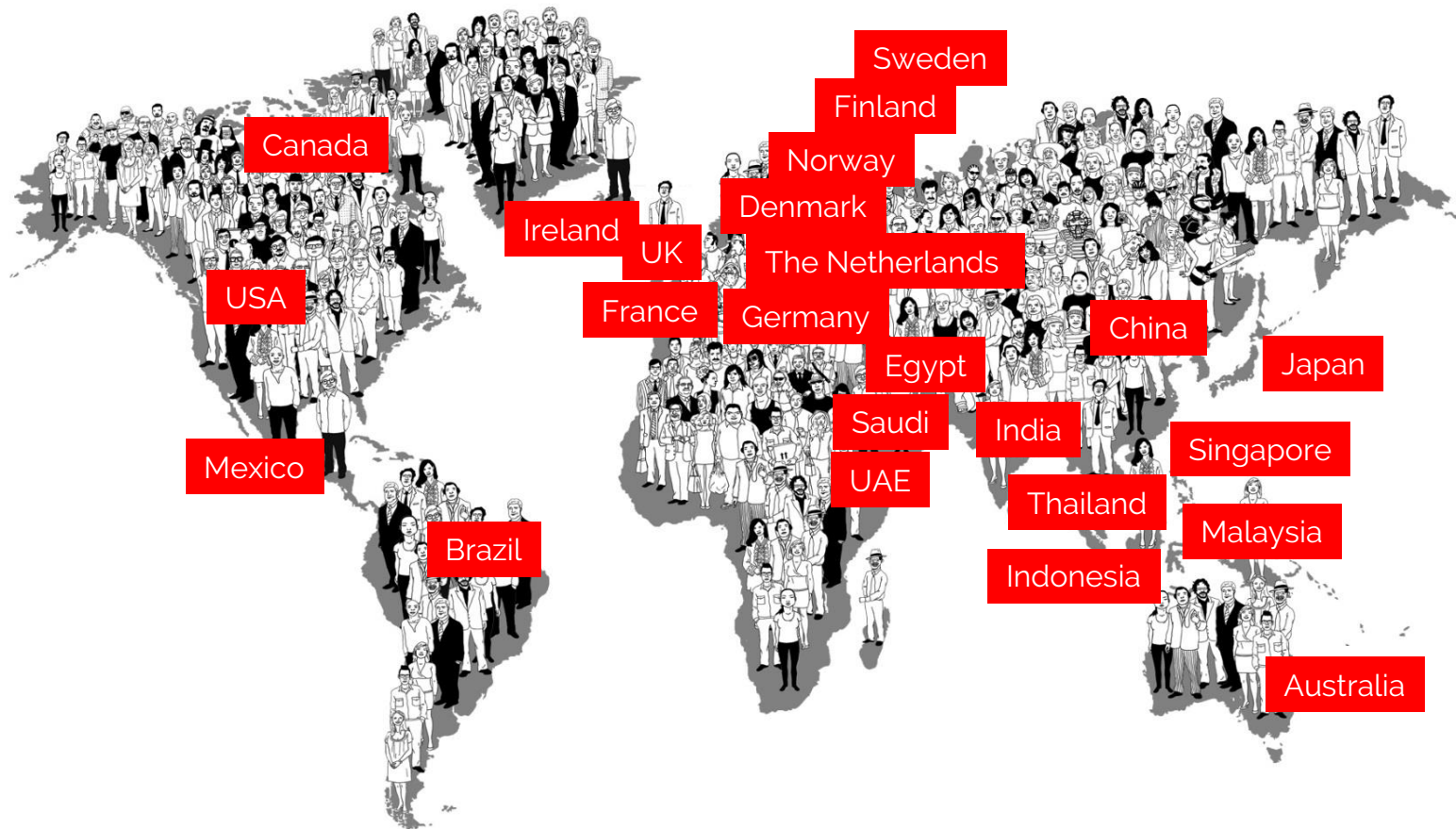
Our clients include brands and their agencies

Brands

Agencies

British Gas

Bank of America

Linked in

OMD

Google

SUBWAY

ASDA

FLEISHMAN
INTERNATIONAL COMMUNICATIONS
HILLARD

BUTLER SHINE STERN & PARTNERS

at&t

BROWN SHOE COMPANY

PANDORA

UM
curious minds for surprising results

MEDIACOM

KFC

Jamba Juice

Reebok

Campbell Mithun

Some Examples

Early impact of all-day breakfast at McDonald's
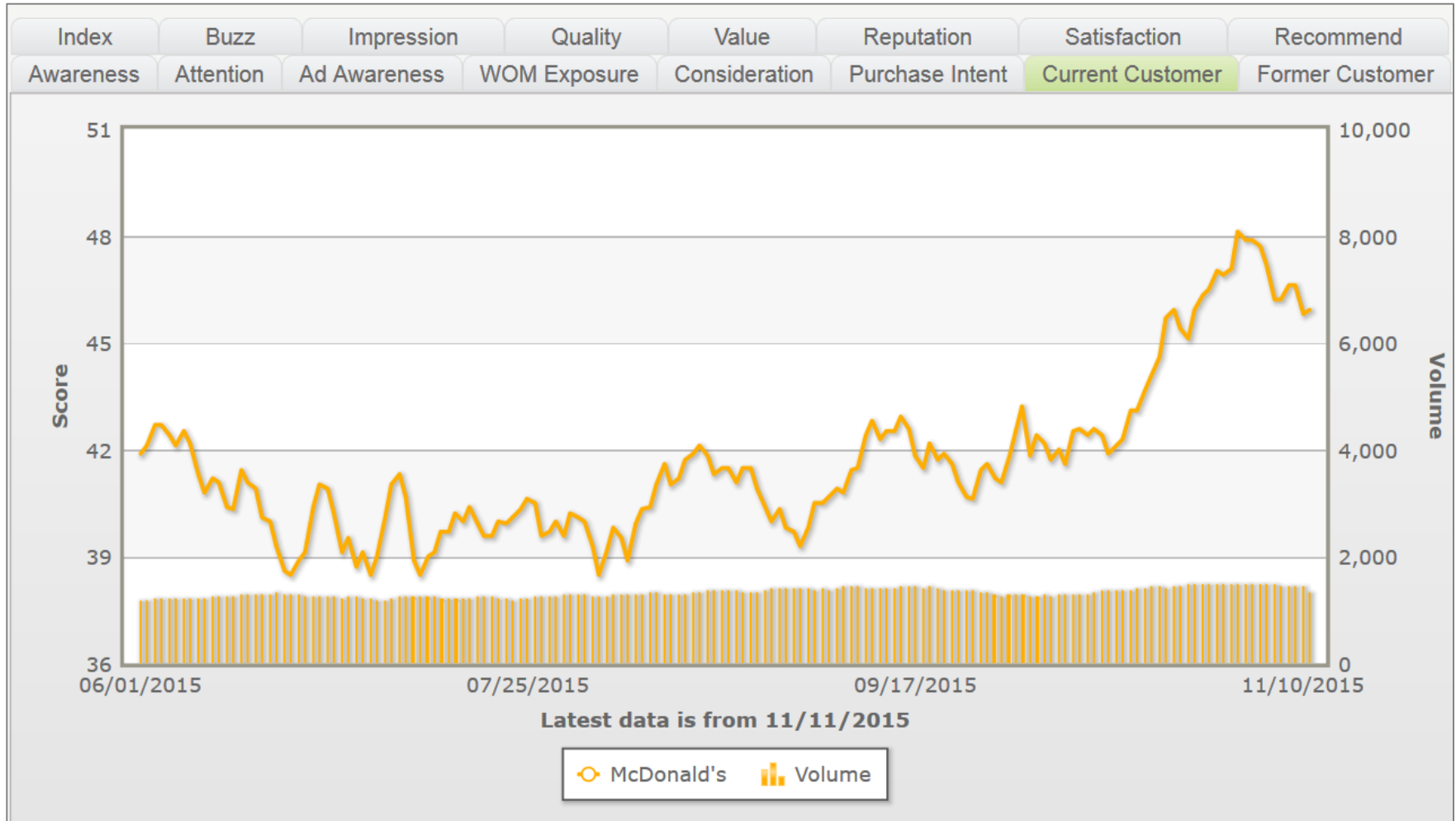
AIG 'Thank You America' campaign
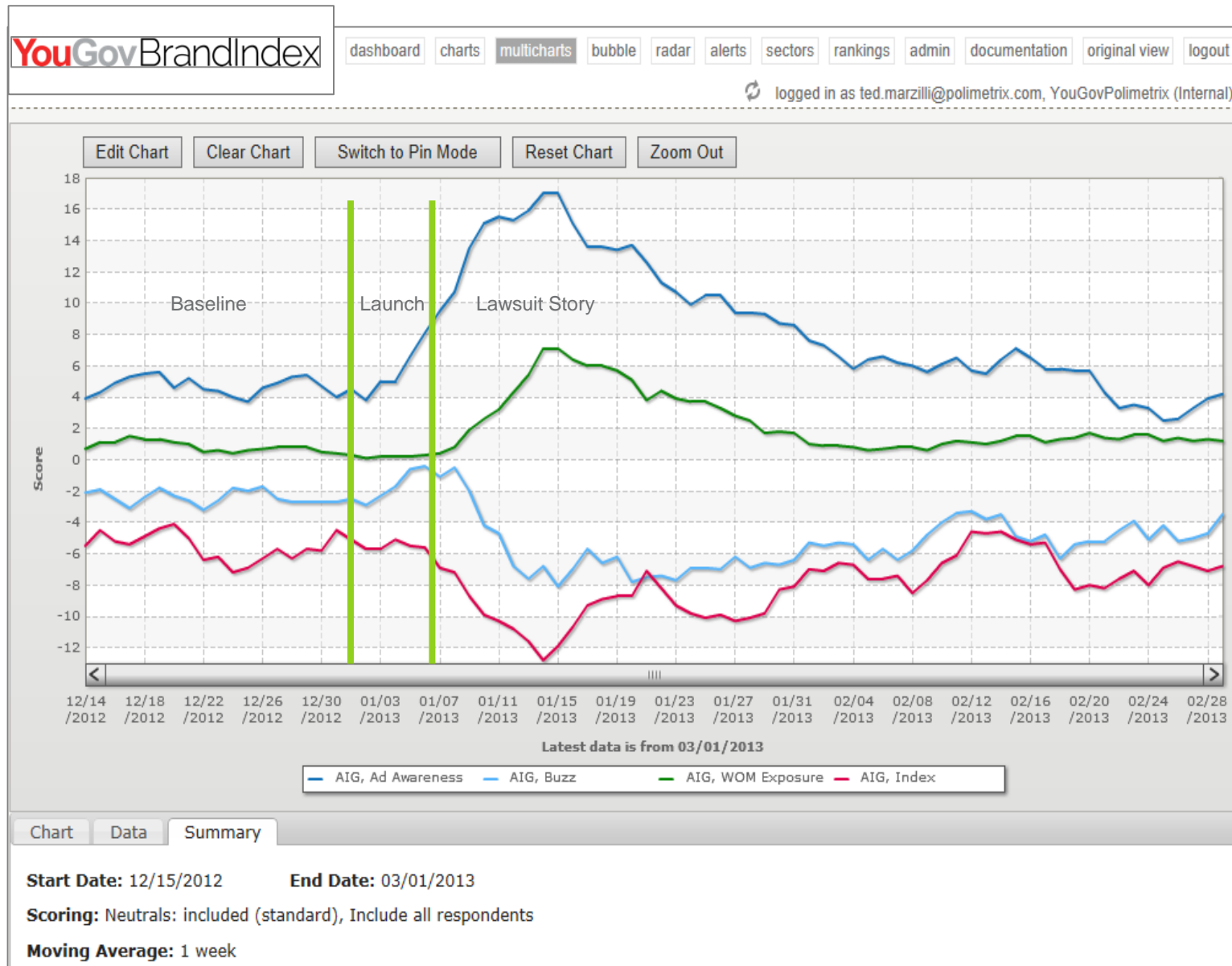
VW crisis – immediate global read
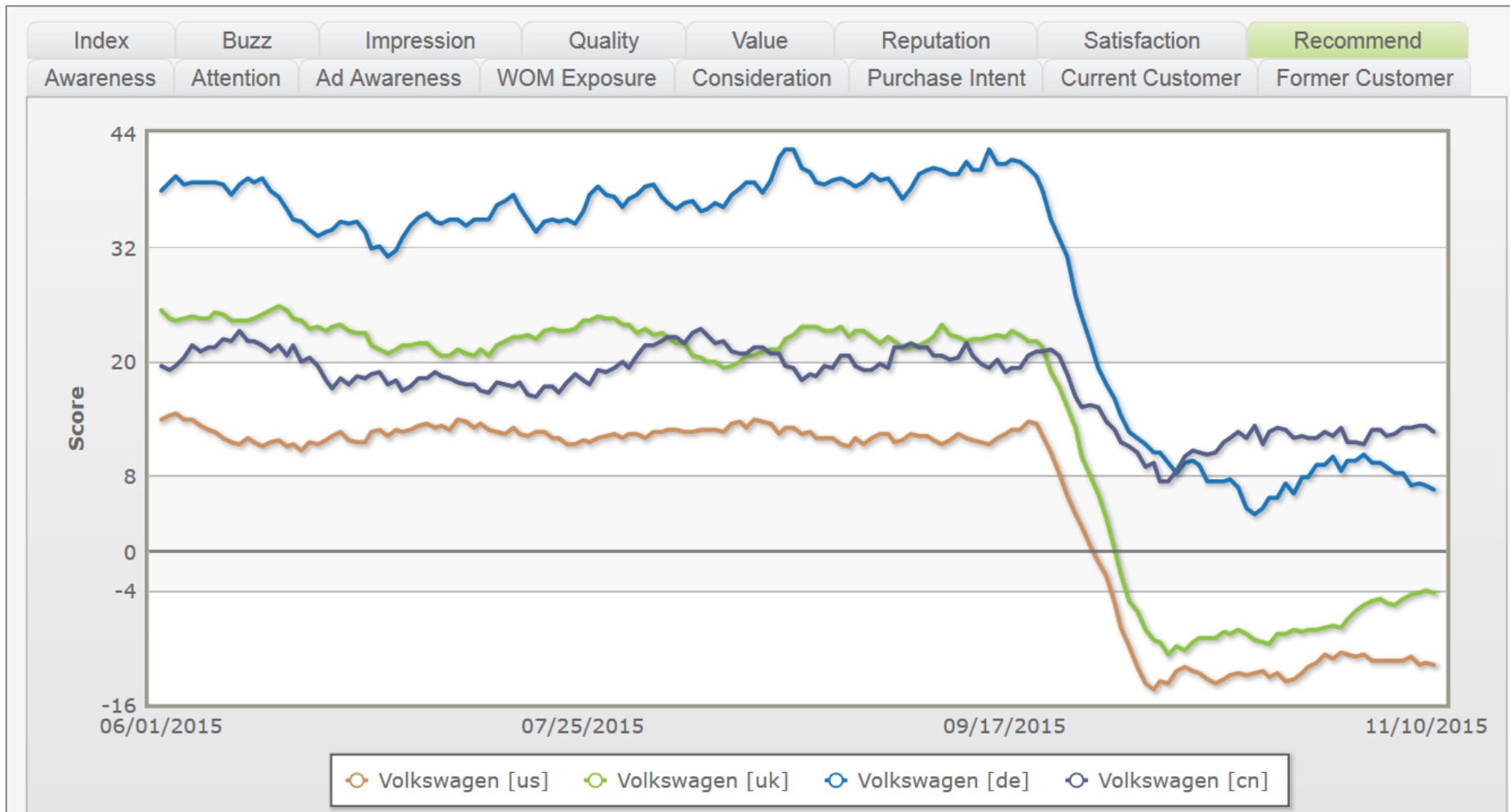
BrandIndex applied to investment theses

Single solution tied to client workflow

Identify → Describe → Target → Track → Evaluate

My Customers

My Brand

YouGov

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.

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.
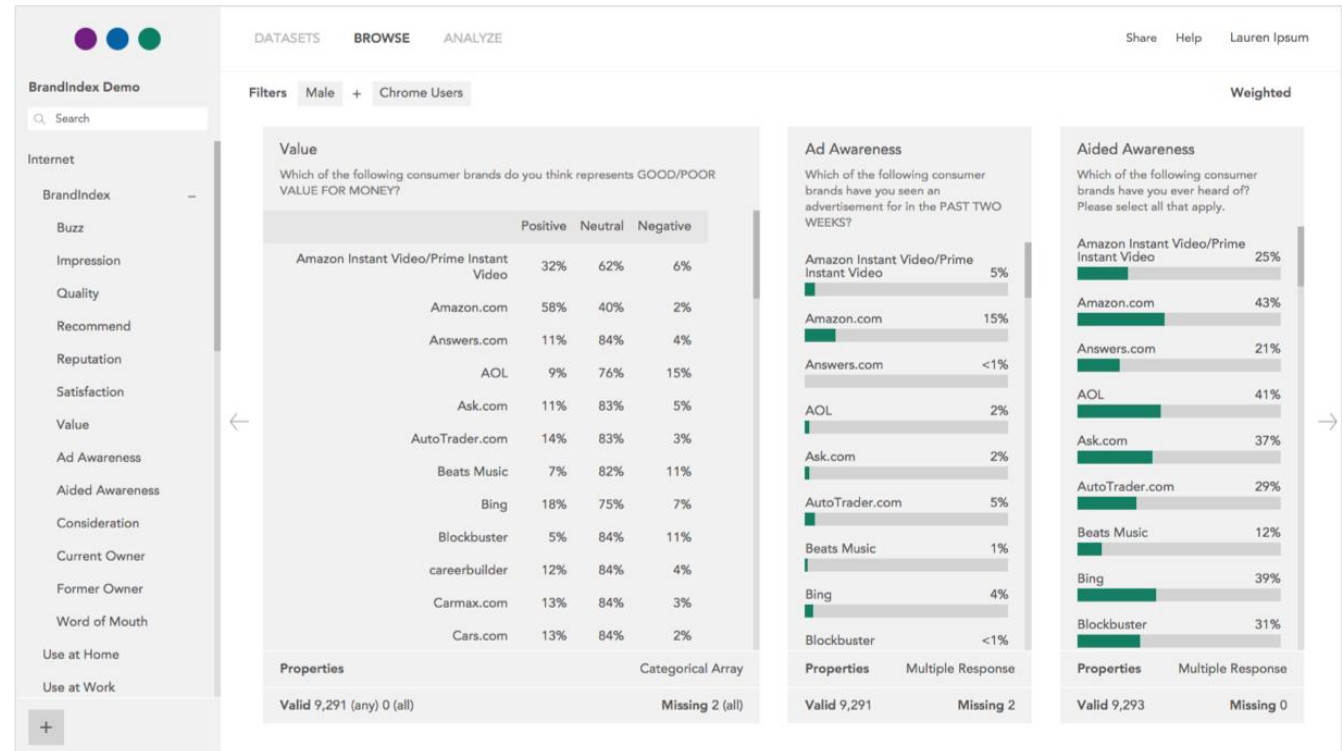
Create complex analyses

- 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.
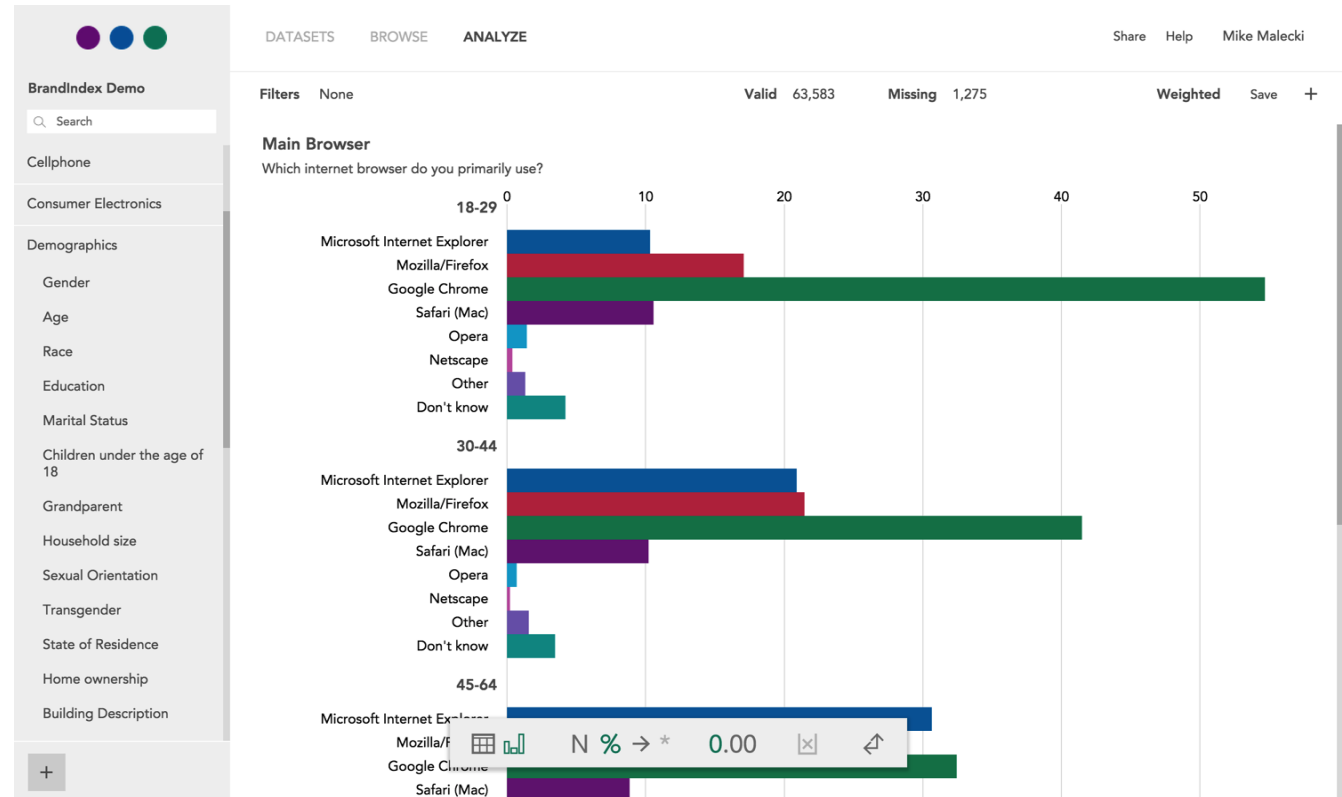
Have it your way

- Crunch adapts to your workflow.

- Do you want a table or a graph?

- Excel or Powerpoint?

- Share your data and analyses with your team.
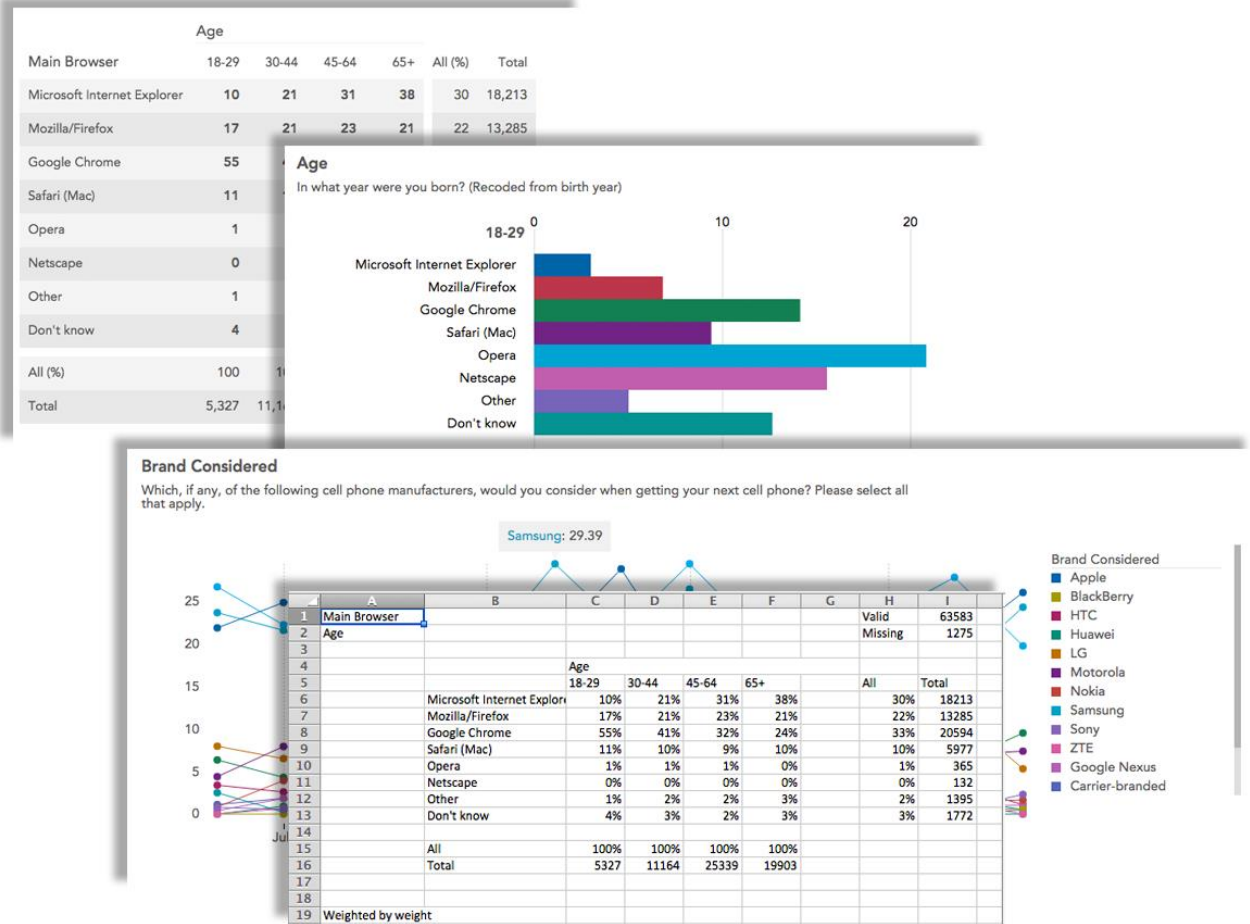
Drill down into your data

- 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.

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 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. <u>Custom Research</u>: a research study including customised deliverables

2. <u>Field & Tab</u>: a study to a niche/specific sample requiring standard and templated deliverables

3. <u>Omnibus</u>: a multi-client survey on a wide range of subjects, run on a regular basis

YouGov

What is the YouGov USP?

✓Speed

✓Accuracy

✓Media coverage

✓Portfolio of Custom Research products

✓Skilled researcher support

✓Global research offering

YouGov

Major opportunities for growth

➢Specialist Omnibus services

➢International

➢Field & Tab services

➢Cube data

➢Automated outputs

YouGov

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

YouGov

Collaborative Insights tool

Collaborative Insights tool

Collaborative Insights tool

Advantages:

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

YouGov

The new world of research

Andy Morris – Chief Innovation Officer

Online Purchase Journey

Video

Combining all of this...

Traditional Survey

YouGov® Online

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

abc

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

Carnival Cruises Buzz

Tempted First-Timers — General Pop

All dummy data
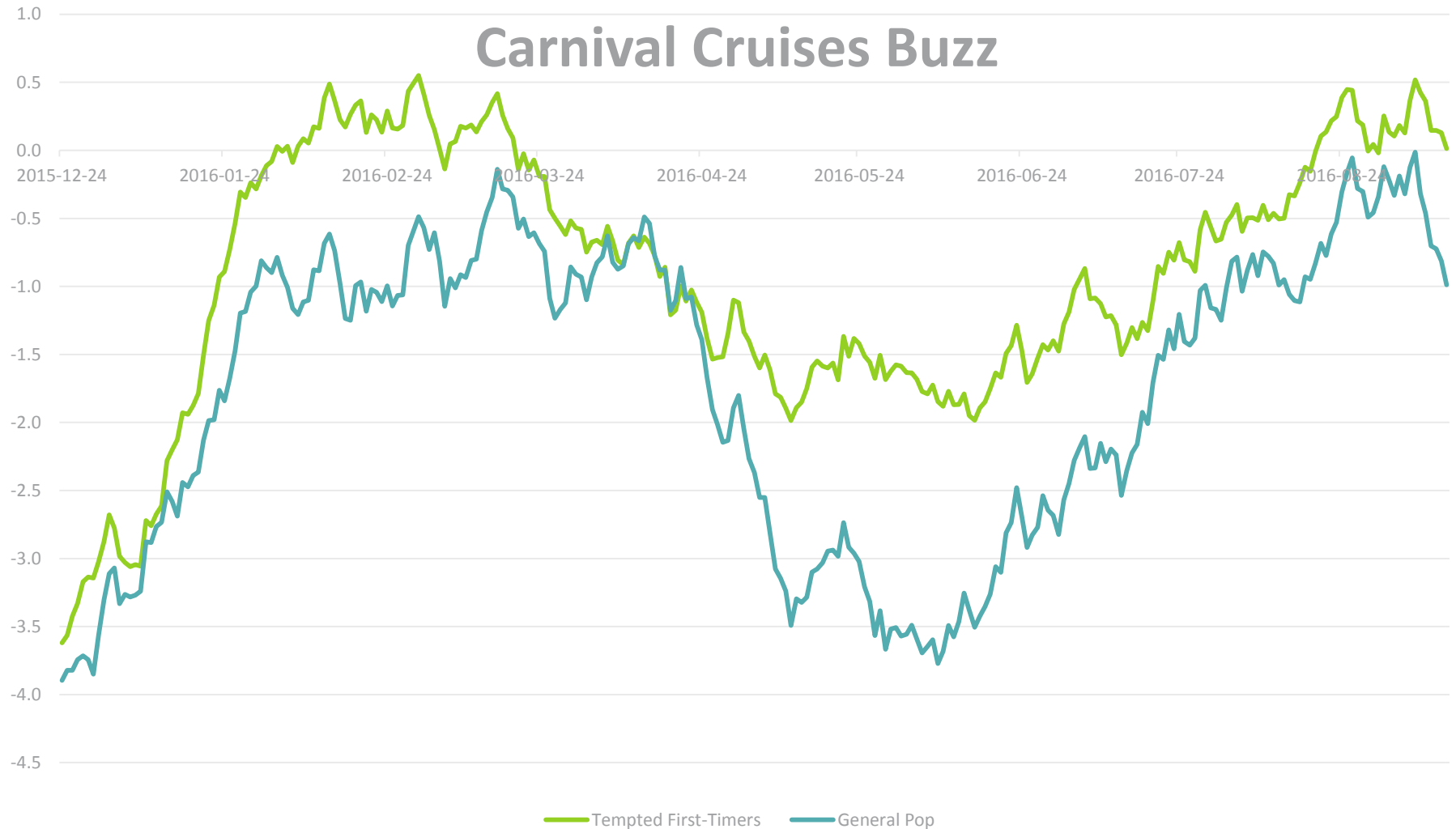
YouGov

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 unparalled

- 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

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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

Thank you.

Questions?

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Don't Just Collect Data. Connect Data.