



# YouGov Capital Markets Day

17 November 2015

**YouGov**<sup>®</sup>

# Agenda

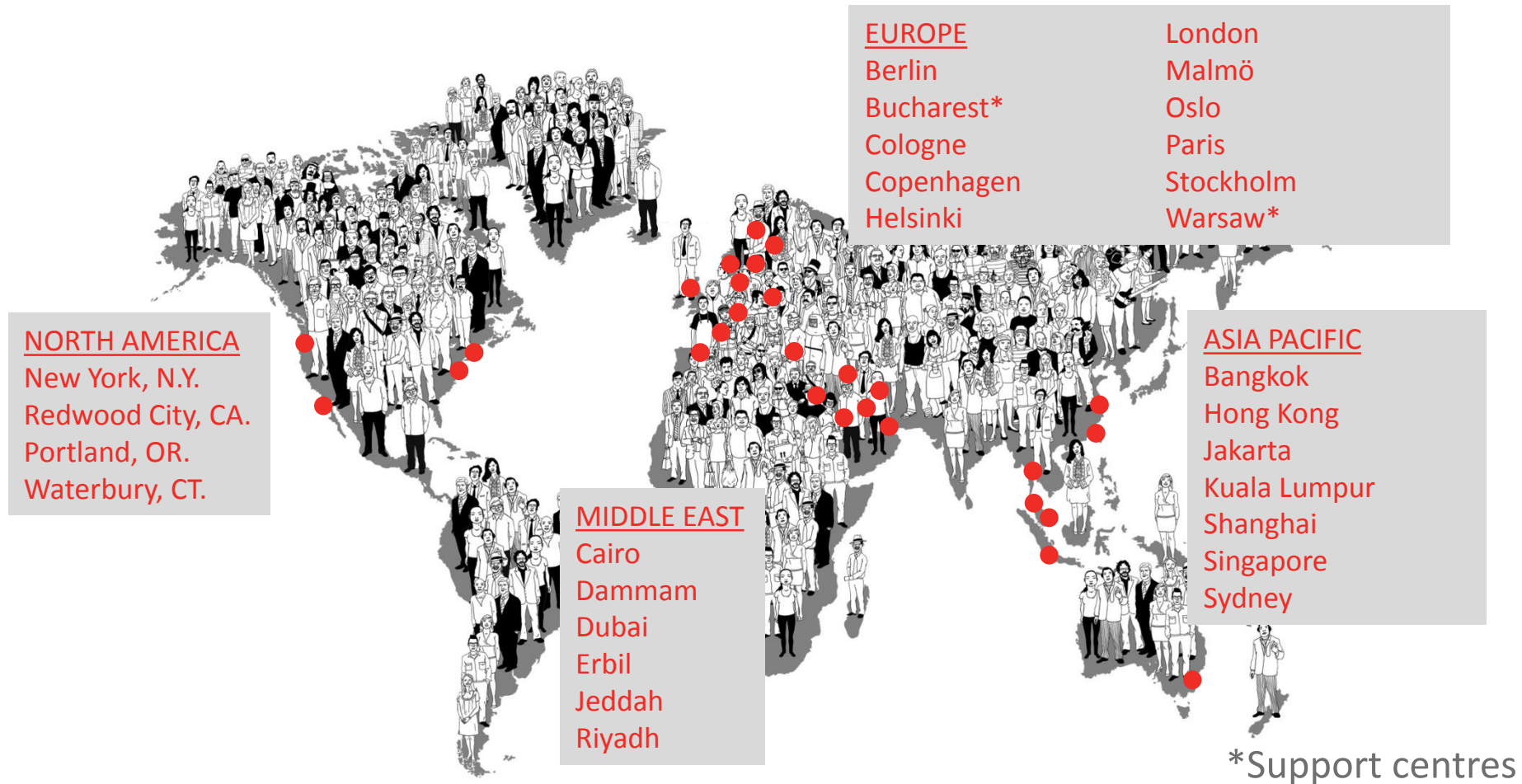
3.00pm	Welcome and Overview – Stephan Shakespeare, CEO
3.20pm	YouGov Online – Freddie Sayers, Chief Digital Officer
3.40pm	YouGov Profiles – Alex McIntosh, UK CEO
4.00pm	YouGov BrandIndex – Ted Marzilli, BrandIndex CEO
4.20pm	Coffee break
4.30pm	Crunch – Doug Rivers, Chief Scientist
4.40pm	YouGov Omnibus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

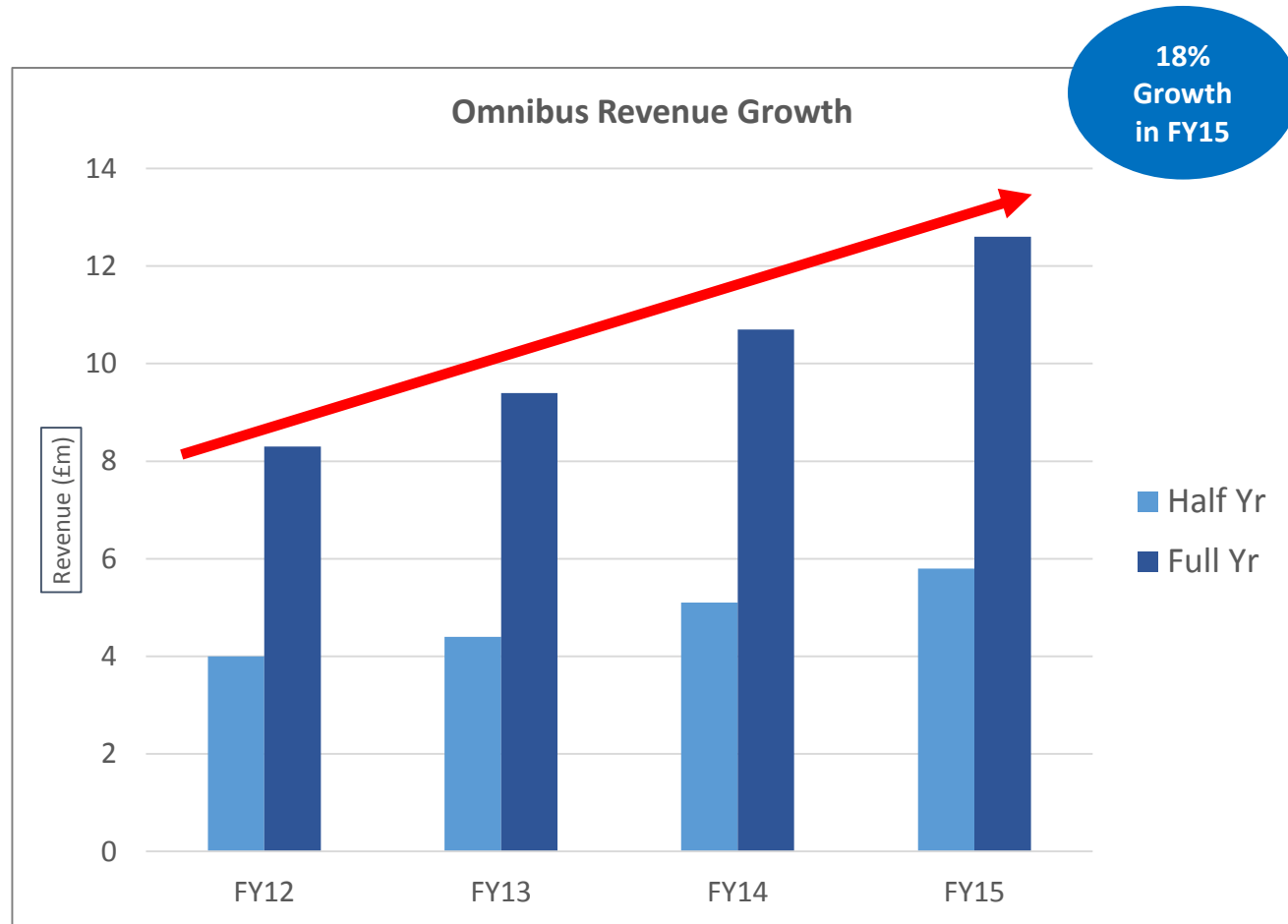


YouGov has one of the world's Top 10 international market research networks



# 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



L'ORÉAL

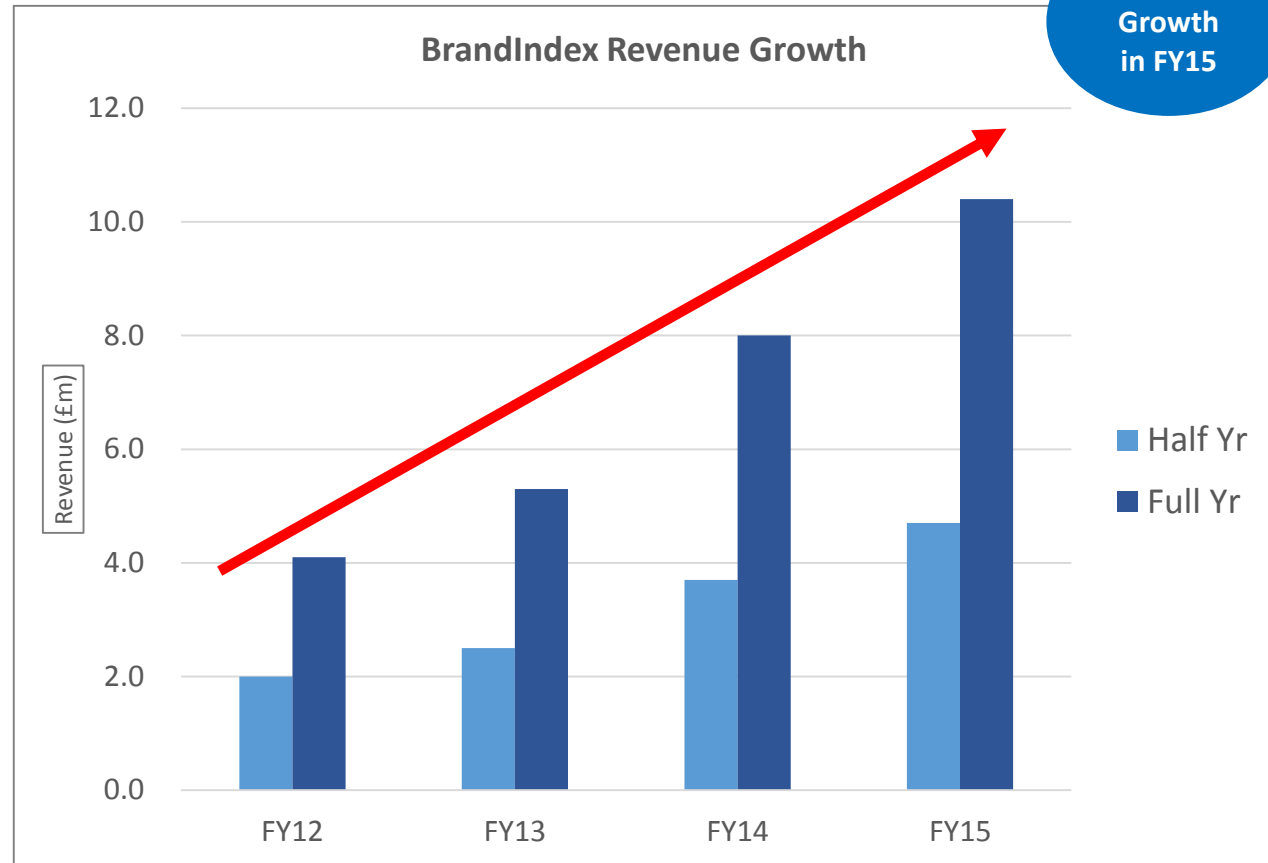


SAATCHI & SAATCHI



# 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



TeliaSonera



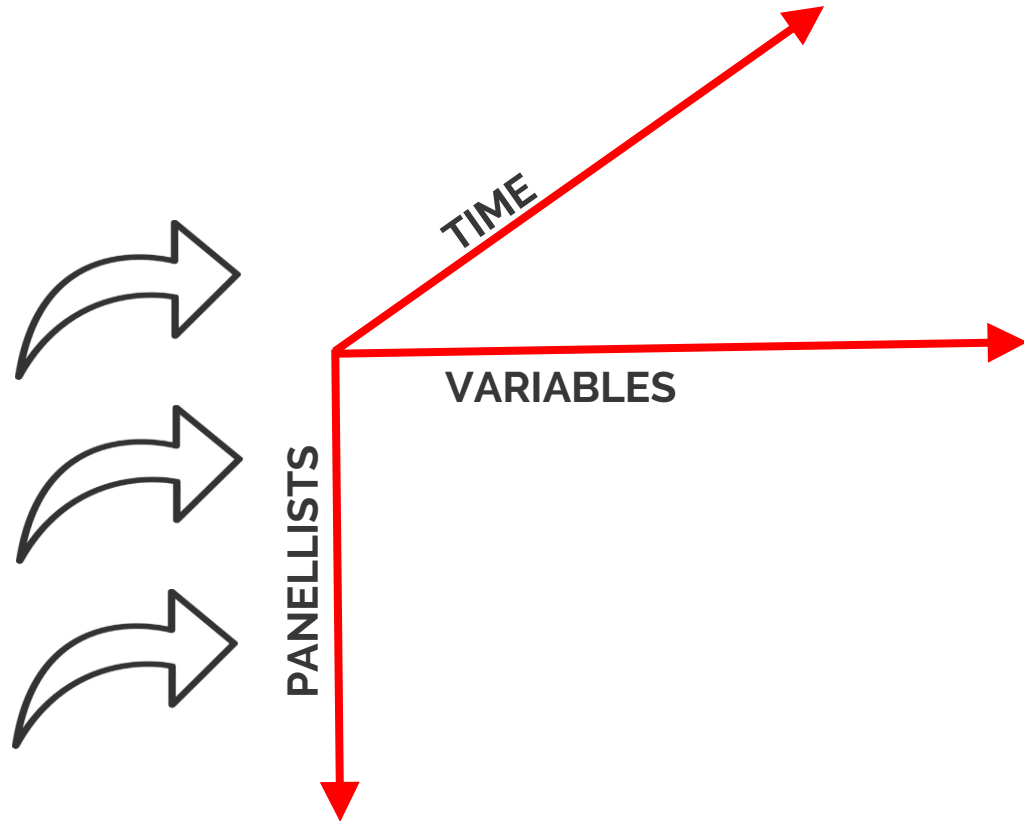
Bank of America



# What is YouGov's new invention?

## The YouGov Cube

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



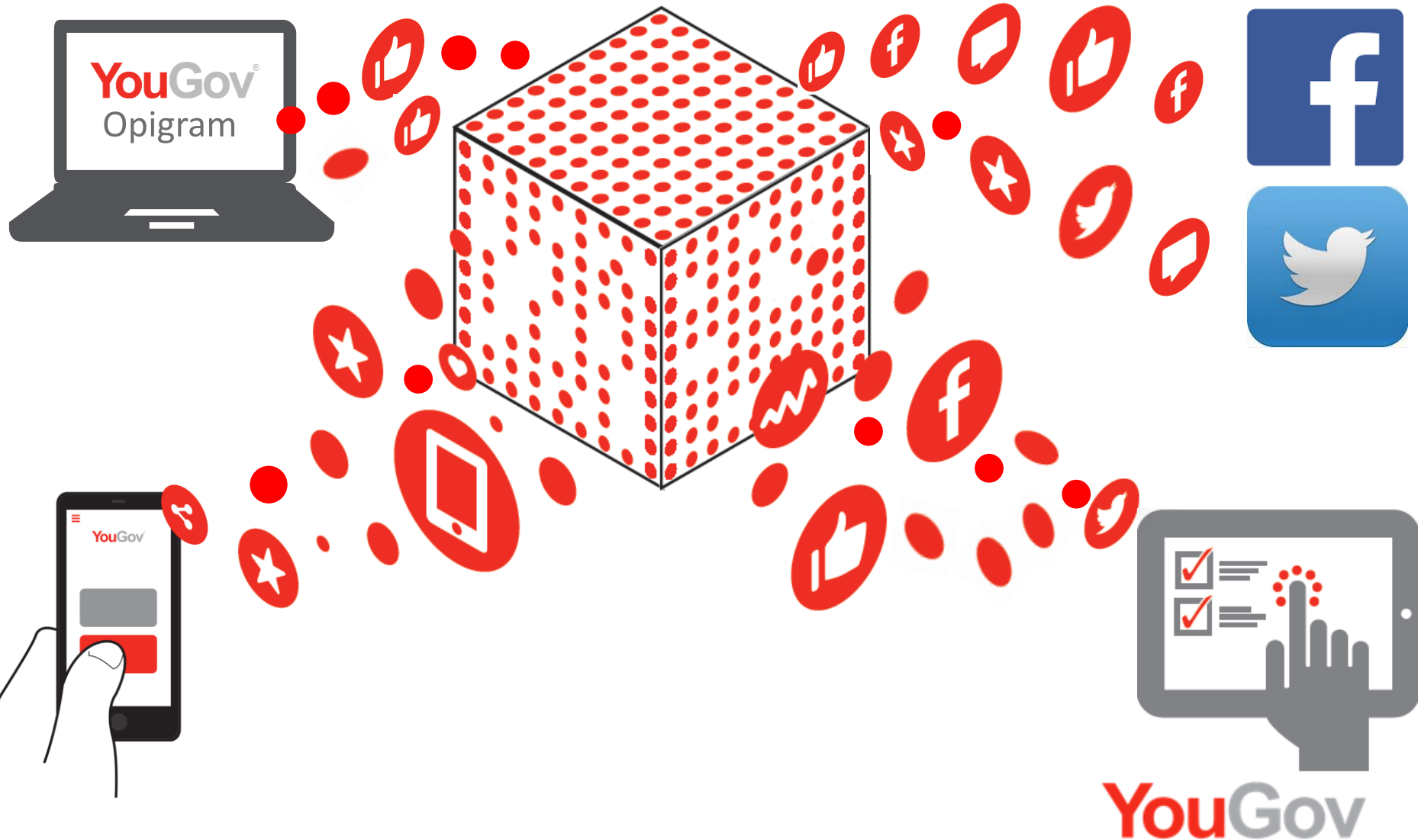
**YouGov**

# 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)

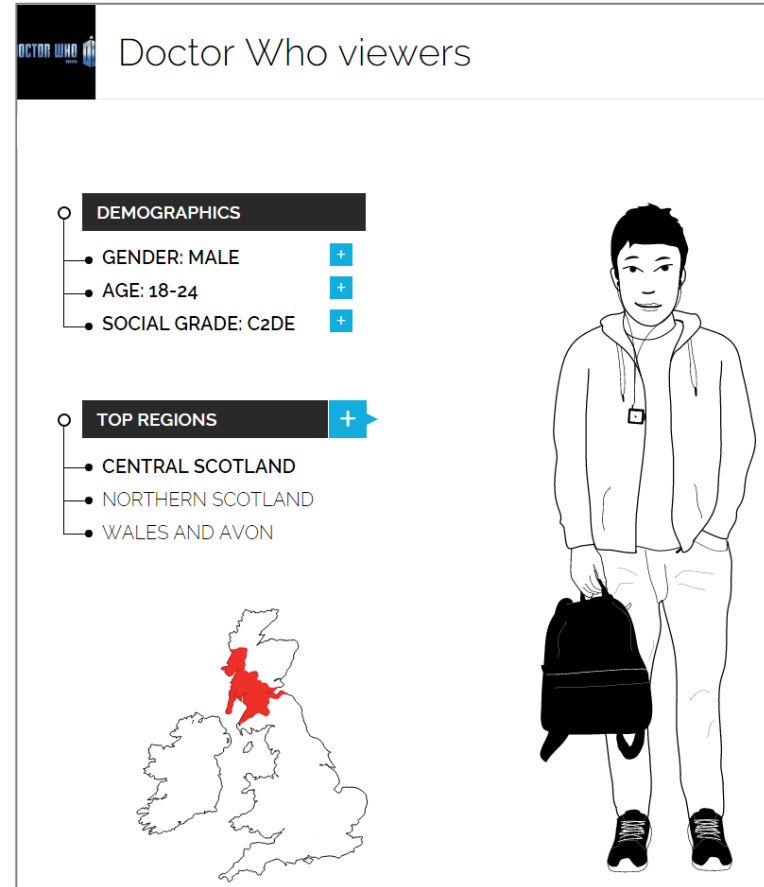


# A variety of platforms for connected data-gathering



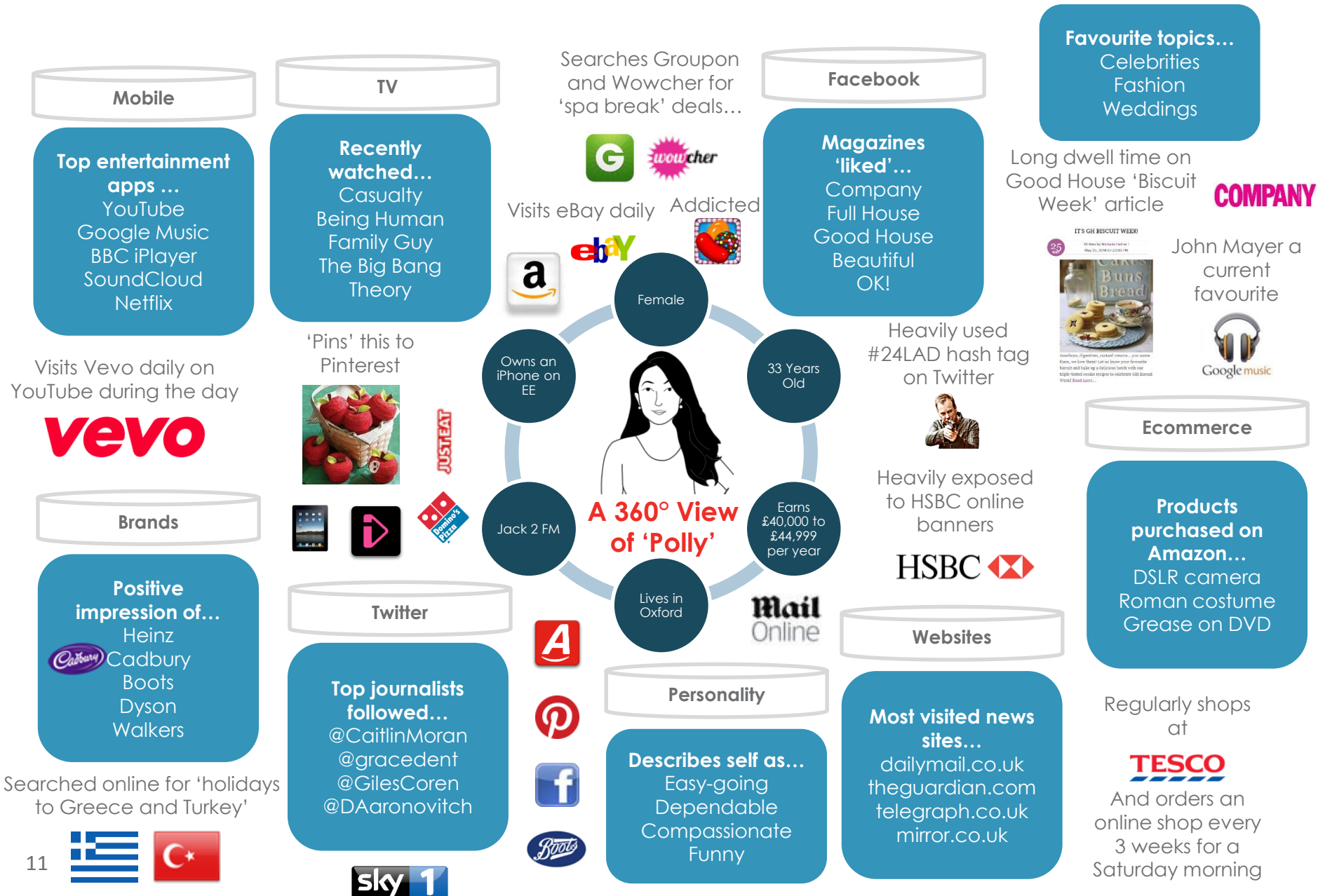
# Crunch (easy-to-use advanced analytics tool)

Combining profiles of 5003 Doctor Who viewers



**YouGov**

# Giving a granular & holistic view of the panellist



# 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  
**Toluna** **SSI**  
e-Rewards

Self-service Polling  
**uSamp**  
THE ANSWER NETWORK  
**SurveyMonkey**

Panel Management  
**VISIONCRITICAL**

Research Agencies  
**GfK** **Ipsos MORI**  
**YouGov**

## Opinion websites

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

Recommendations  
**hunch** **goodreads** **livestar**  
**amazon**

Social Media  
**facebook**  
**twitter**

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

Commenting on news  
**GAWKER**  
**THE HUFFINGTON POST** **MailOnline**



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

## Research companies

Sample Providers



Self-service Polling



Panel Management



Research Agencies



## Opinion websites

Rate & Review



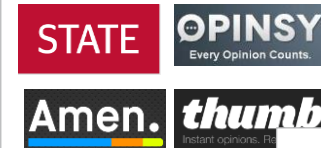
Recommendations



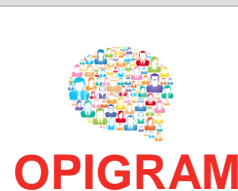
Social Media



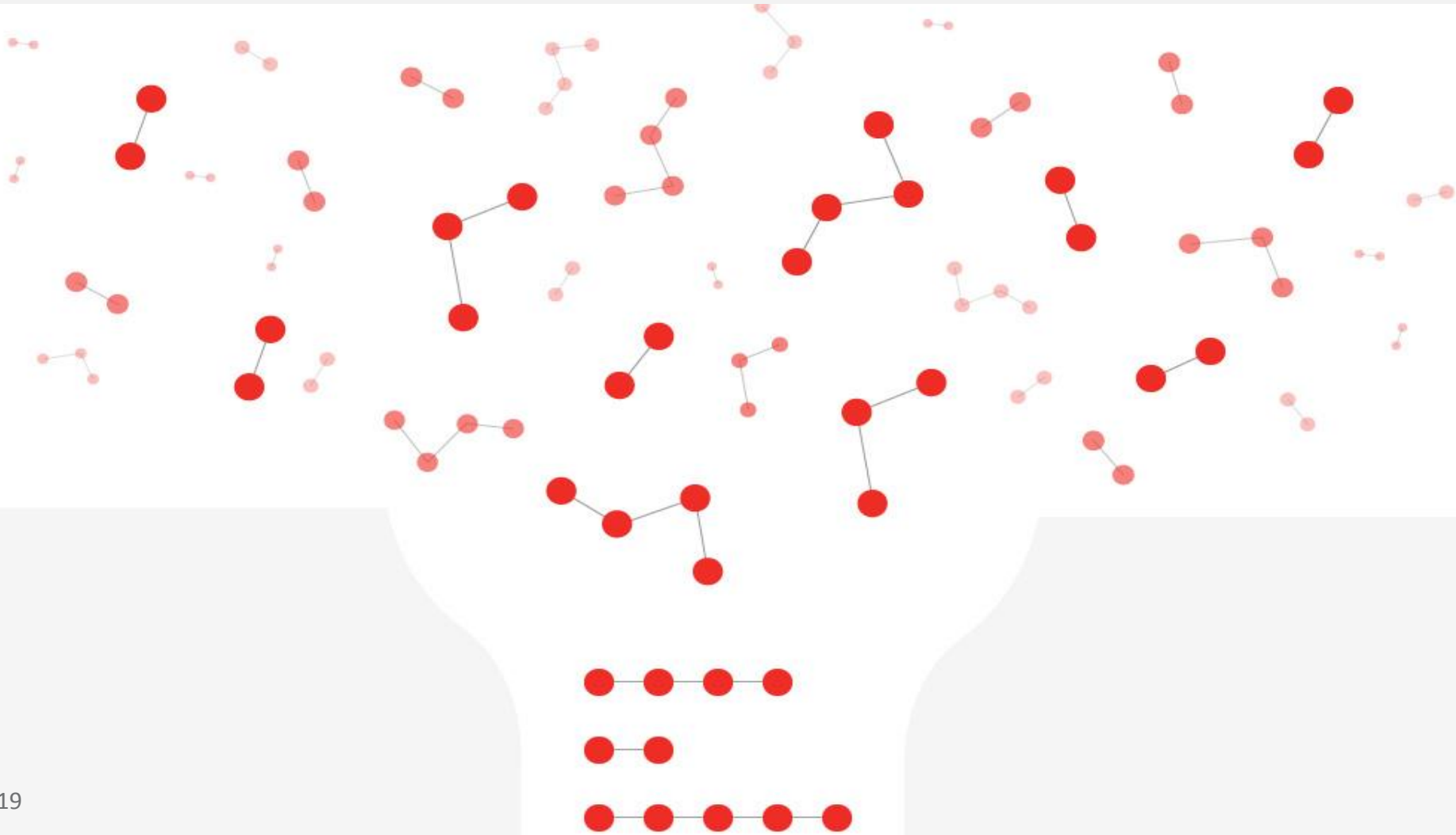
Opinion Networks



Commenting on news



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...

YouGov UK

TAKE PART

SEE RESULTS

SOLUTIONS

1 925 LOGOUT

Search...

Q

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

BBQ Champ

Great British Menu

GoggleBox

Doctor Who

Jane the Virgin

Doc Martin

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...

Q

Feedback

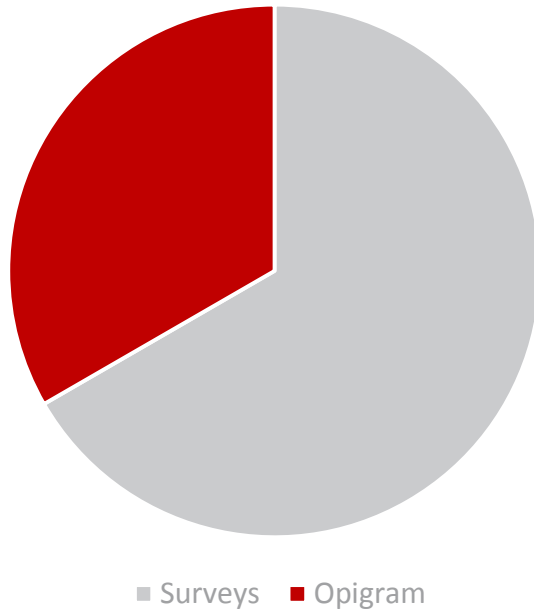


....and everything is stored on your Opigram profile



# 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

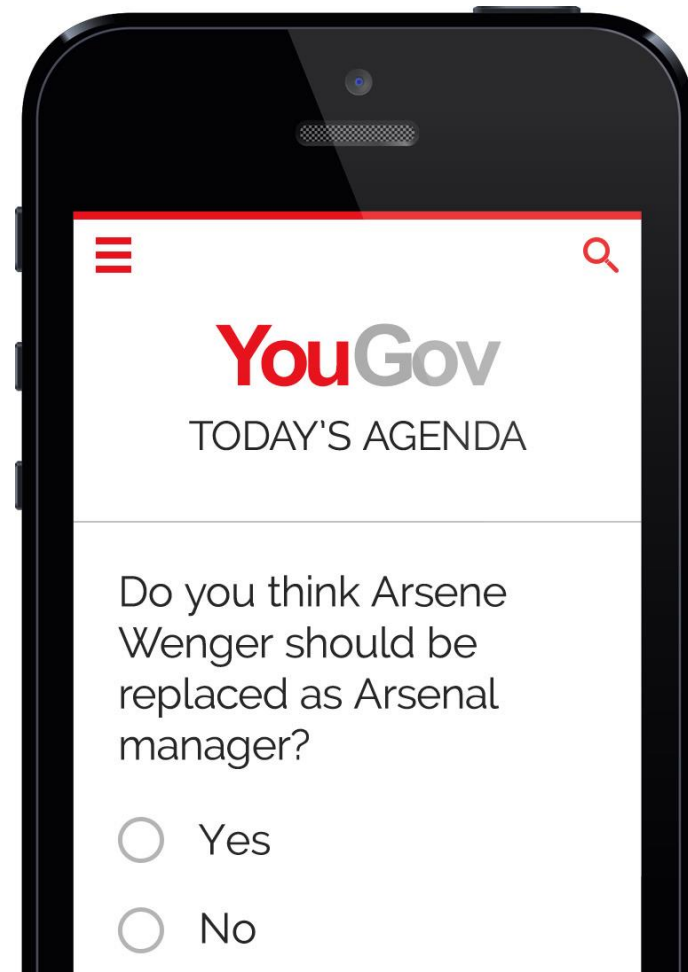
What next?

# Our online offer: reasons to take part

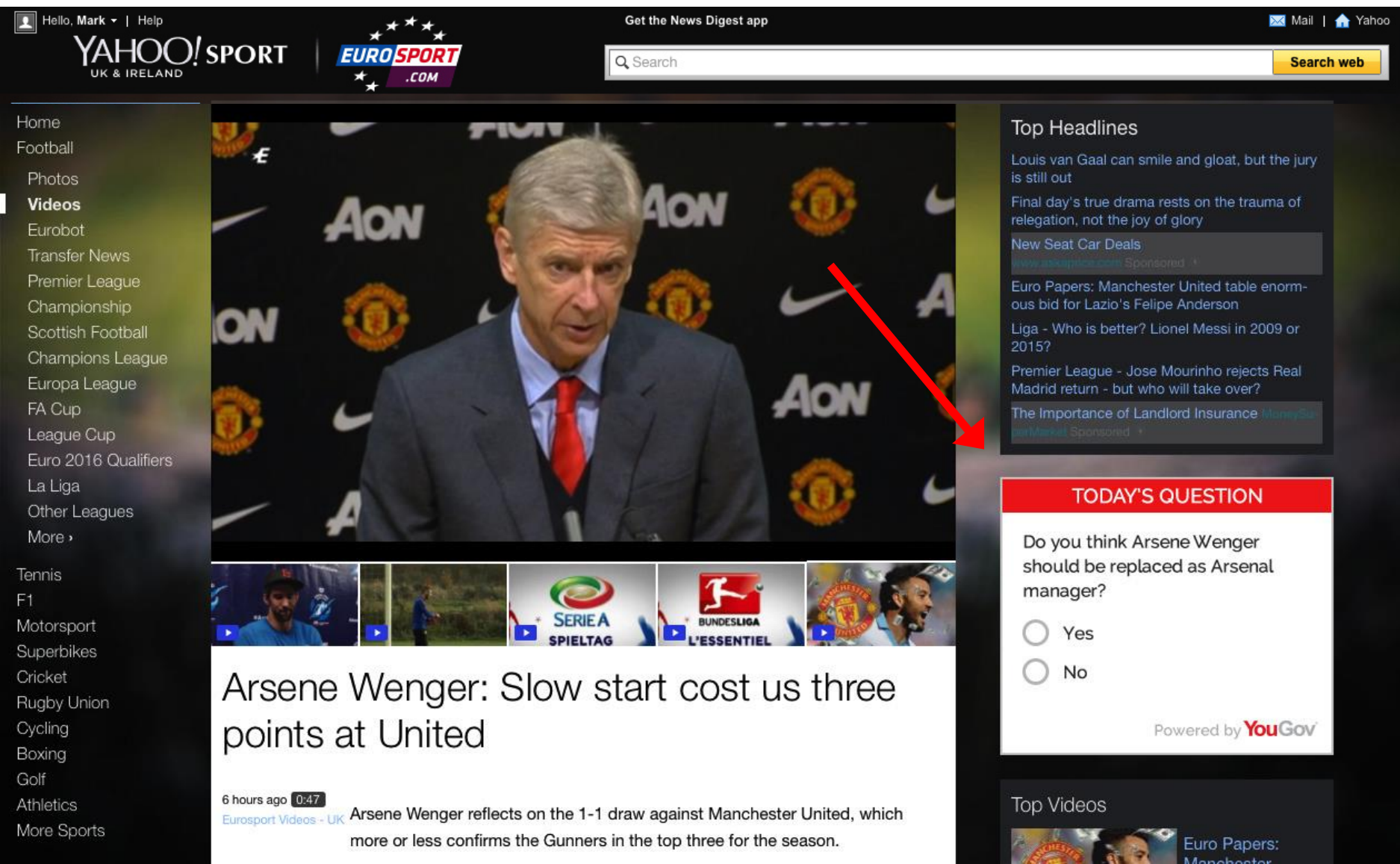
- Interest: stimulating, important questions
- Social: define yourself in the community
- Rewards: earn money and prizes

# 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! Sports website interface. At the top, there's a navigation bar with 'Hello, Mark', 'Help', 'Get the News Digest app', and links for 'Mail' and 'Yahoo'. Below this is the 'YAHOO! SPORT' logo with 'UK & IRELAND' underneath, and the 'EUROSPORT.COM' logo. A search bar is located on the right side of the top bar.

On the left side, there's a vertical menu with links to various sports sections: 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 these are links for Tennis, F1, Motorsport, Superbikes, Cricket, Rugby Union, Cycling, Boxing, Golf, Athletics, and More Sports.

The main content area features a large video of Arsene Wenger speaking at a press conference. Below the video, there's a headline: 'Arsene Wenger: Slow start cost us three points at United'. The video is from 'Eurosport Videos - UK' and is 6 hours old. A red arrow points from the video to the 'Top Headlines' section on the right.

The 'Top Headlines' section on the right lists several articles: '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' (Sponsored), '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?', and 'The Importance of Landlord Insurance' (Sponsored).

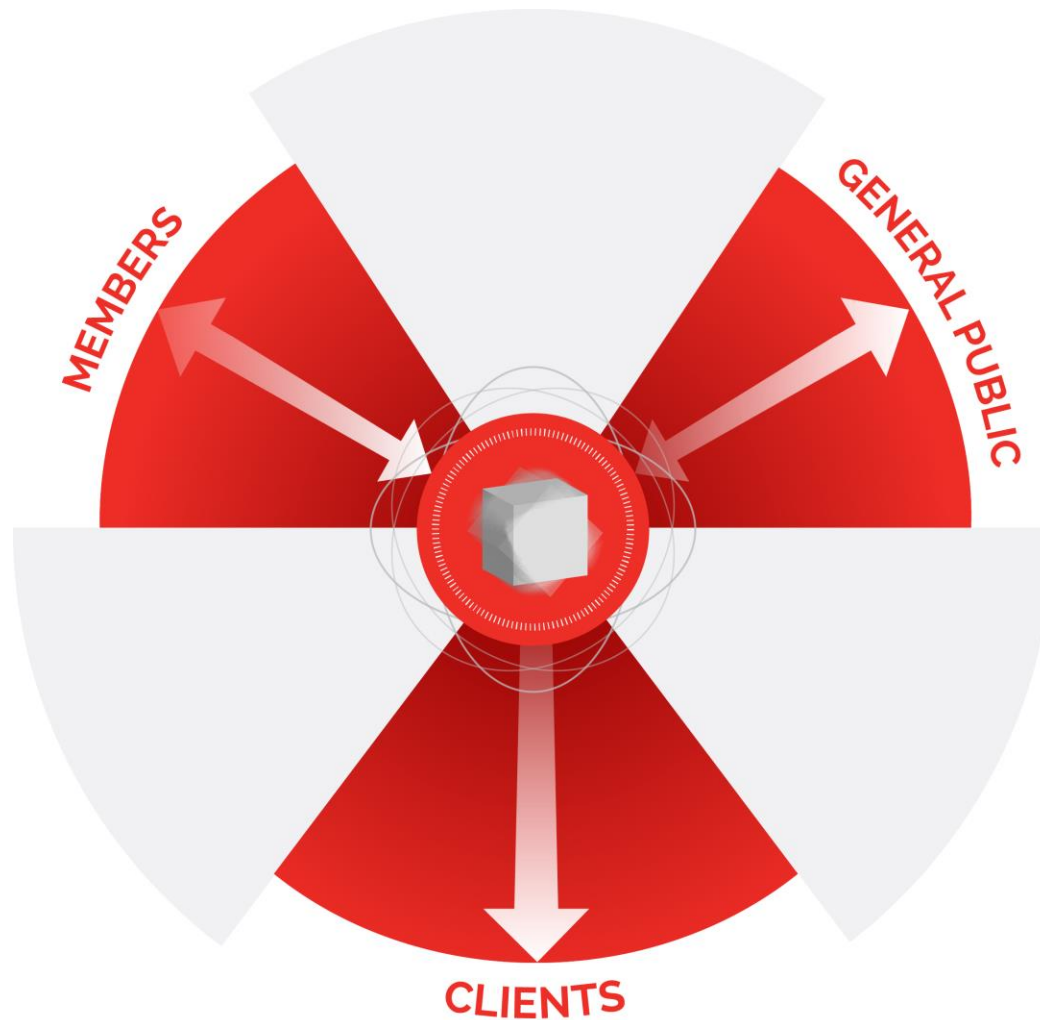
Below the headlines is a section titled 'TODAY'S QUESTION' with a red header. It asks: 'Do you think Arsene Wenger should be replaced as Arsenal manager?'. There are two radio buttons for 'Yes' and 'No'. At the bottom of this section, it says 'Powered by YouGov'.

At the bottom right, there's a 'Top Videos' section with a video thumbnail for 'Euro Papers: Manchester'.

Bringing together our  
audiences



# YouGov can be seen as a single web application



**YouGov**

# 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

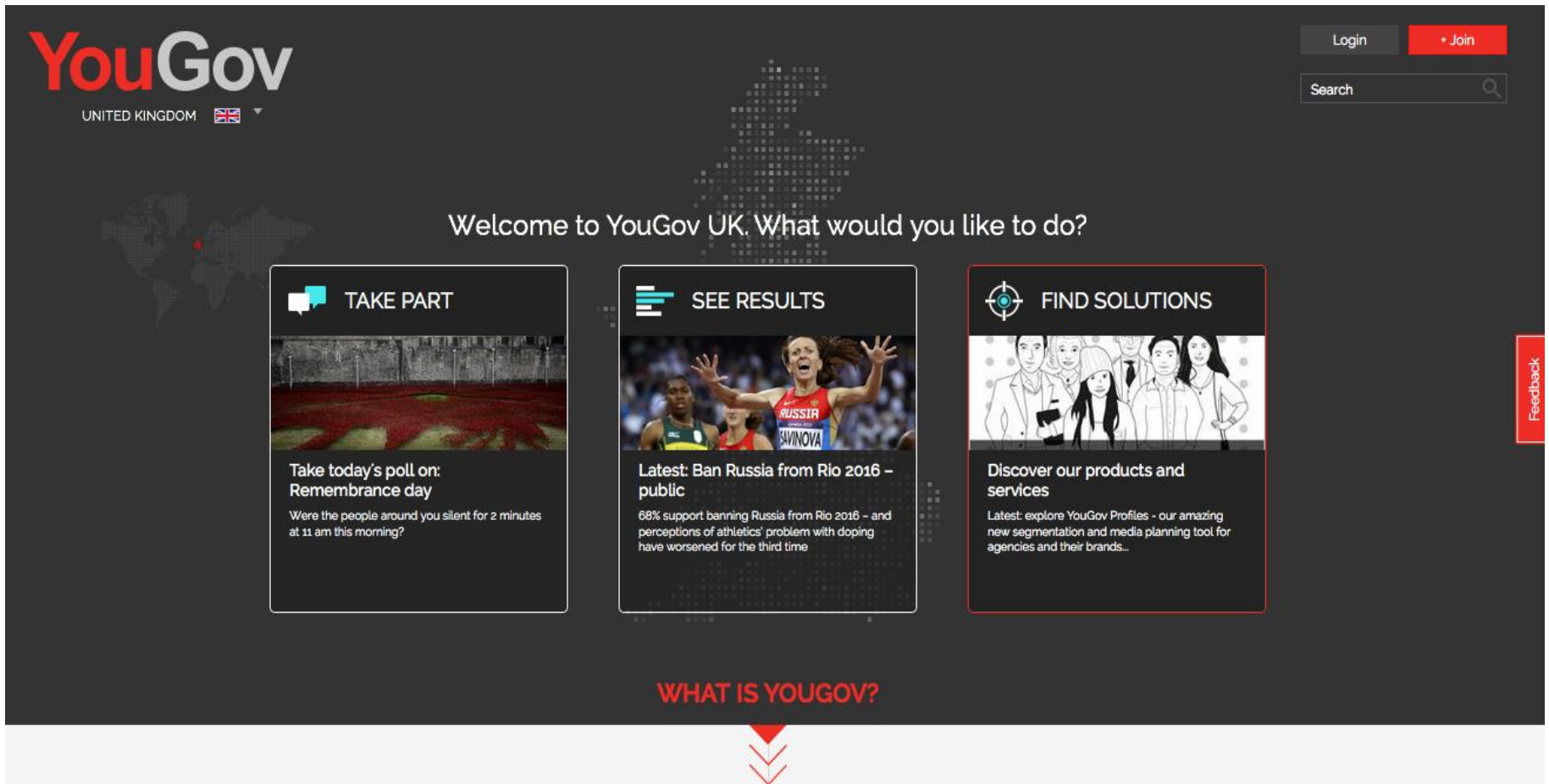
The image displays three overlapping screenshots of the YouGovProfiles LITE interface, illustrating the user experience for generating leads in different countries.

**Top Screenshot (UK):** Shows the "Customers of Coca-Cola" profile. The interface includes a search bar, a welcome message "Welcome Freddie!", and a "LOGOUT" button. The "Now showing" section indicates the profile is based on data from the UK.

**Middle Screenshot (US):** Shows the "Customers of Coca-Cola" profile. The interface includes a search bar, a welcome message "Welcome Freddie!", and a "LOGOUT" button. The "Now showing" section indicates the profile is based on data from the US.

**Bottom Screenshot (Germany):** Shows the "Coca-Cola-Kunden" profile. The interface includes a search bar, a welcome message "Willkommen Freddie!", and a "LOGOUT" button. The "Aktuelle Ansicht" section provides details about the profile, including the sample size (4575) and the date (6. Nov 2015). The profile is categorized by "DEMOGRAPHIE" (Geschlecht: Männl, Alter: 35 bis 44) and "BUNDESLAND" (Niedersachsen, Nordrhein-Westfalen, Rheinland-Pfalz, Schleswig-Holstein, Hessen). A map of Germany highlights the selected regions. The profile also includes a "POLIT. SELBSTEINSTUFUNG" (Polit. Selbstestufung) section with a gauge showing "LINKS" and "RECHTS" (Right), and a "HAUSHALTSEINKOMMEN" (Household Income) section showing a range of 2.000€ - 3.500€.

# 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

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

Our segmentation and media planning product for agencies and brands



- 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 silver car is parked at an outdoor electric vehicle charging station. A red charging cable is plugged into the car's port and extends to the station. The background shows a green field and a blue sky with some clouds. The scene is brightly lit, suggesting daytime.

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

The background of the slide features a close-up, slightly blurred image of several network cables. The cables are primarily blue and yellow, with their RJ45 connectors visible. They are tangled together, creating a sense of complexity and connectivity. The lighting is soft, highlighting the textures of the cable jackets and the metallic contacts of the connectors.

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 3<sup>rd</sup> party agencies
- ✓ **Reducing** investment in multiple insight products that serve different purposes by investing in one single-sourced 3<sup>rd</sup> 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*





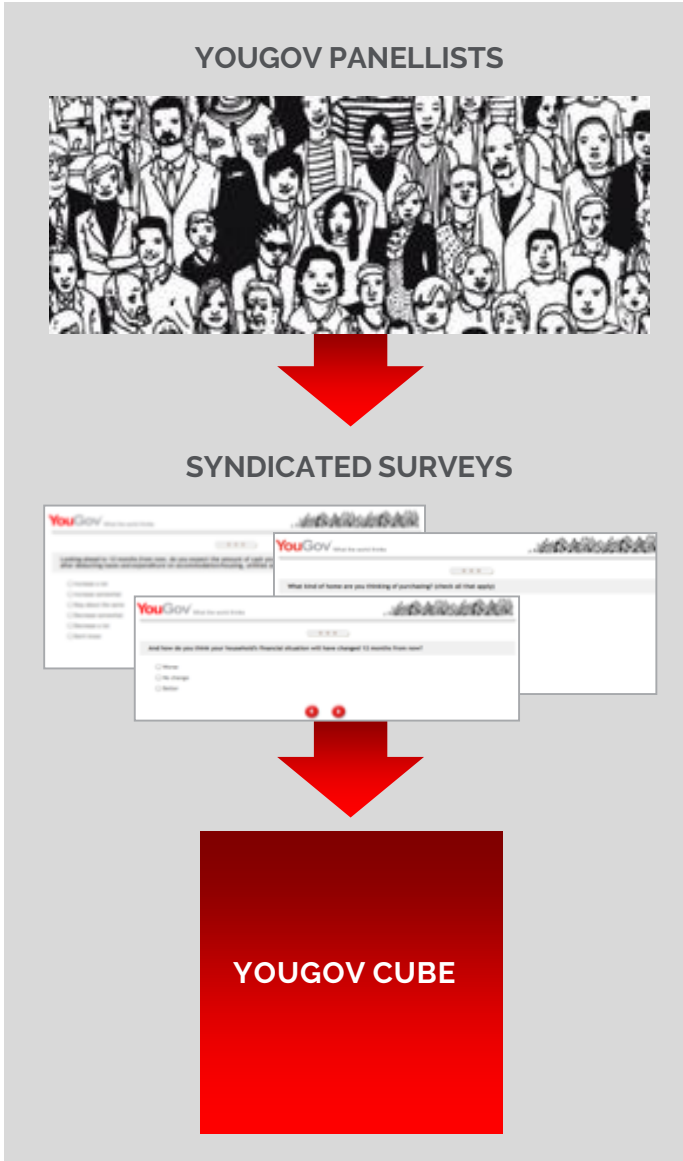
A large crowd of people is gathered at night, holding up numerous glowing blue light sticks. The scene is dark, with the primary light source being the blue sticks held high by the crowd. In the background, a building with some lit windows is visible. The overall atmosphere is that of a large-scale event or concert.

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?*

# 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

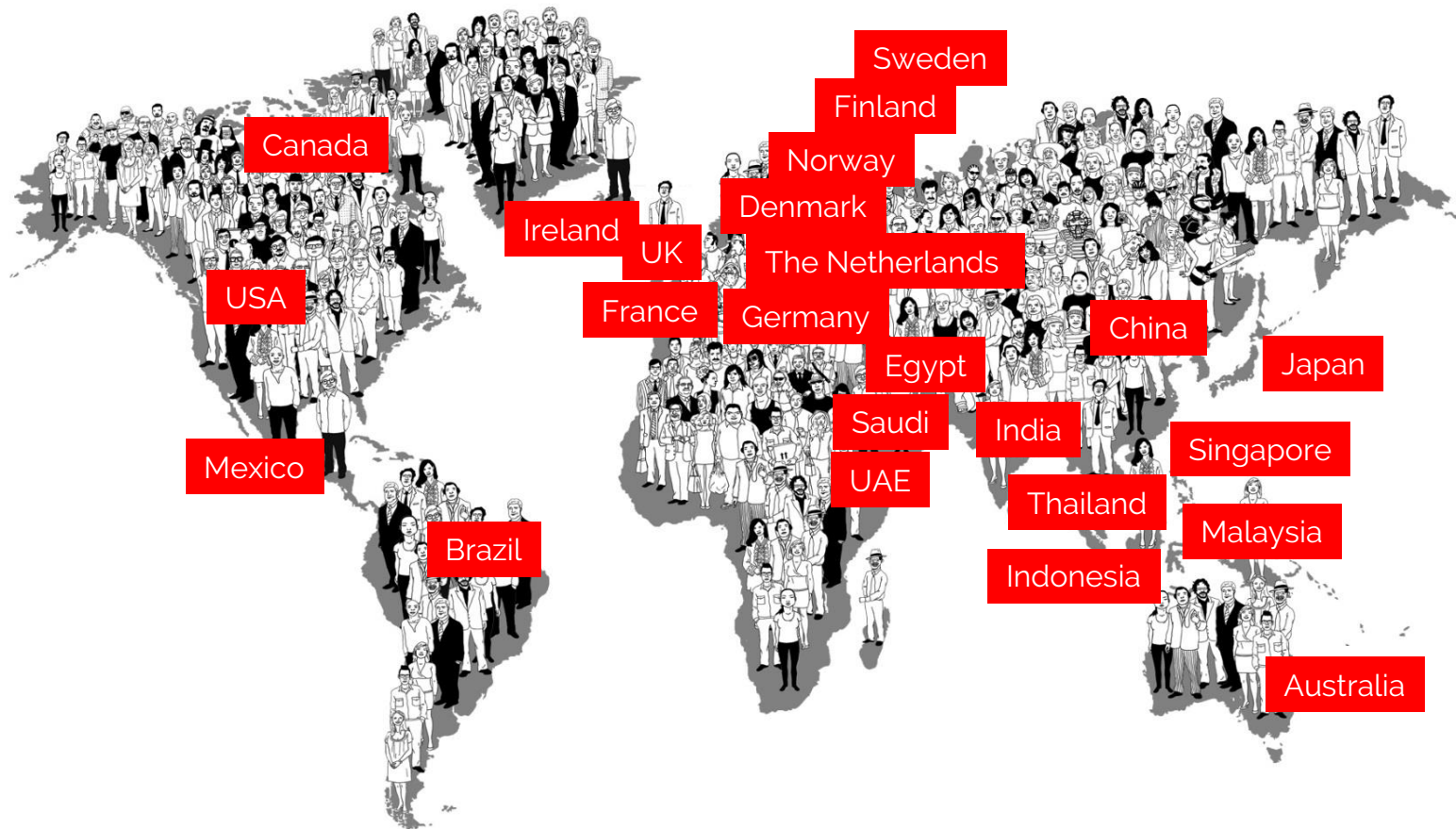
- *Have my customers heard about the crisis? Are they sticking with me or skeptical? Considerers?*
- *What is the impact by consumers who have heard / participated in WOM vs. those who haven't?*

## 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



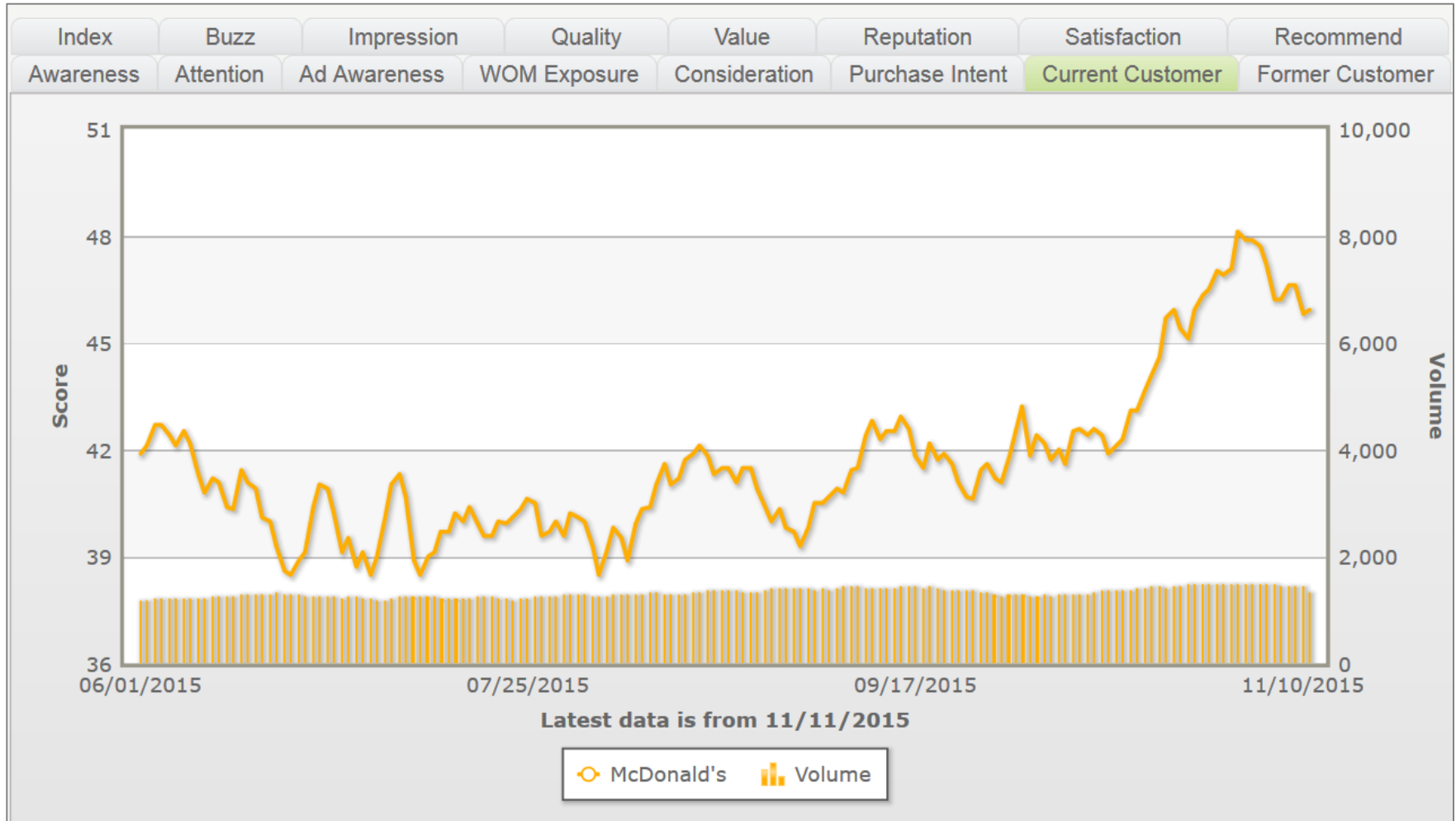
## Agencies



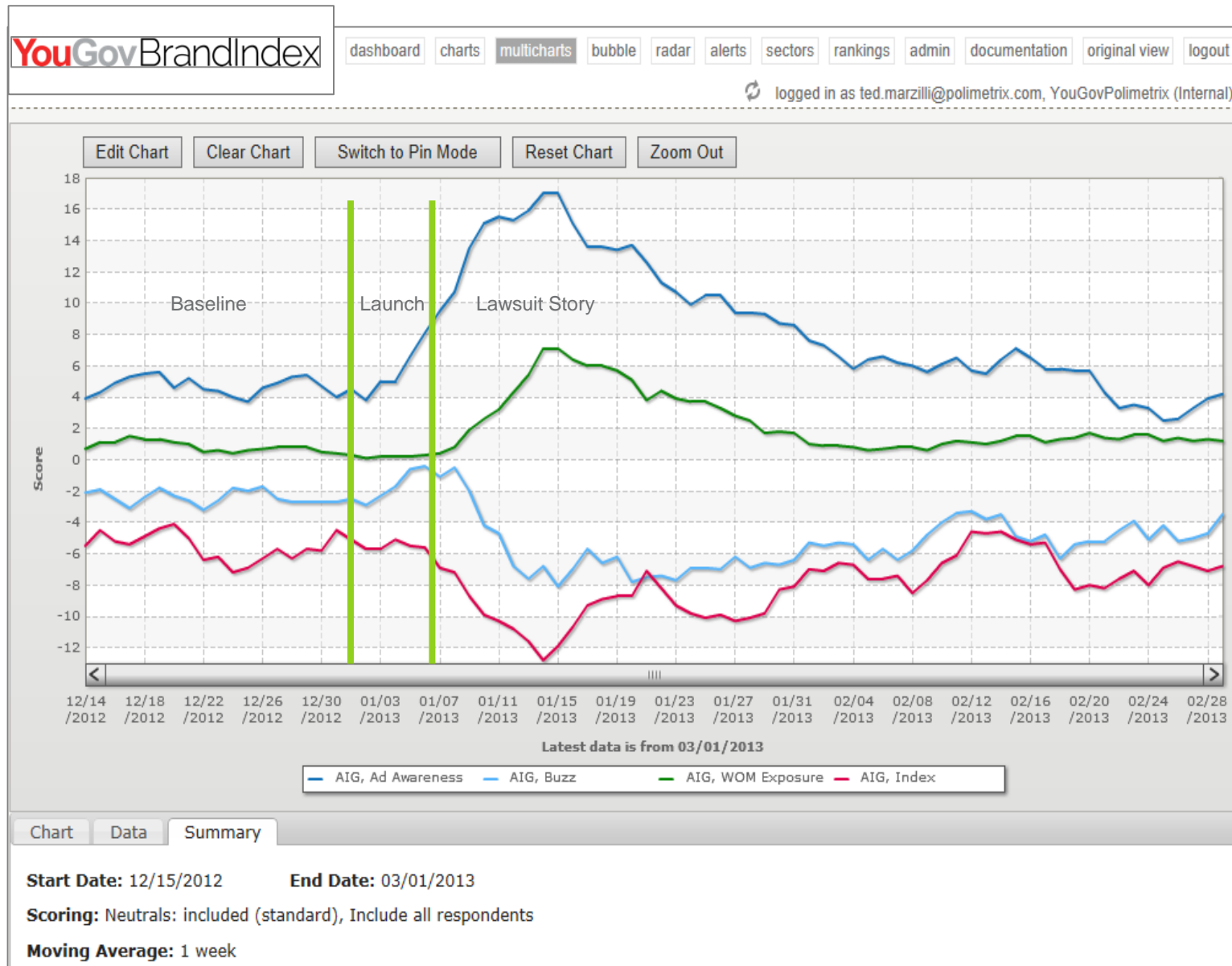


# Some Examples

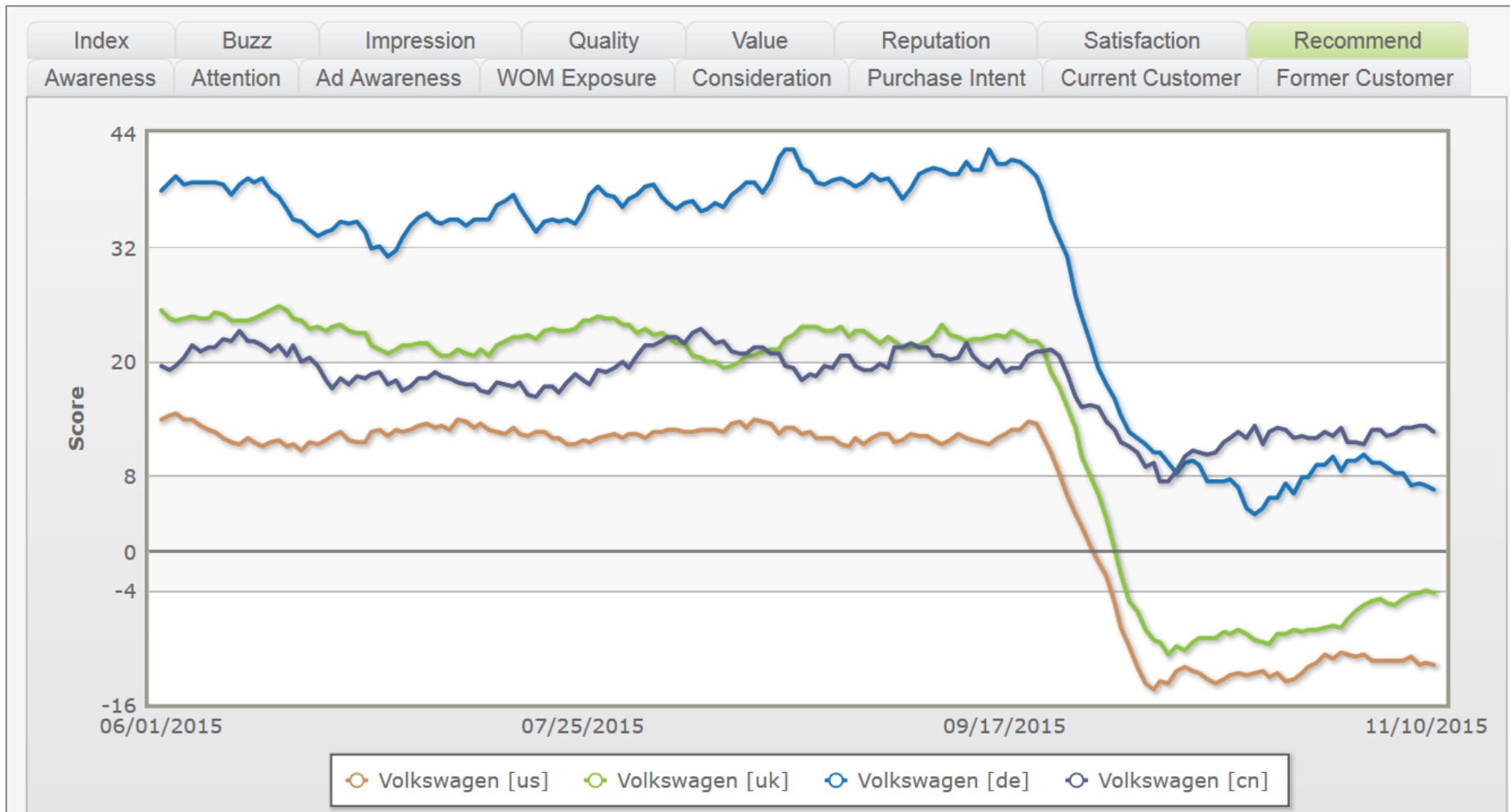
# Early impact of all-day breakfast at McDonald's



# 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

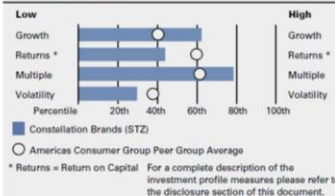
### What's changed

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



Key data	Current
Price (\$)	87.46
12 month price target (\$)	97.06
Market cap (\$ mn)	16,782.6
Dividend yield (%)	NM
Net margin (%)	14.3
Debt/capital (%)	54.8

	2/14	2/15E	2/16E	2/17E
Revenue (\$ mn)	4,867.7	6,042.1	6,347.5	6,606.3
EPS (\$)	3.25	4.30	4.84	5.97
P/E (X)	18.3	20.4	18.1	14.6
EV/EBITDA (X)	12.4	13.7	12.3	10.6
ROE (%)	16.4	15.8	15.4	17.4

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 1<sup>st</sup>)** — 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.

YouGov

# 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 three colored circles (purple, blue, green) and the word 'DATASETS'. A search bar contains the text 'Search'. On the right, there are links for 'Help' and 'Mike Malecki'.

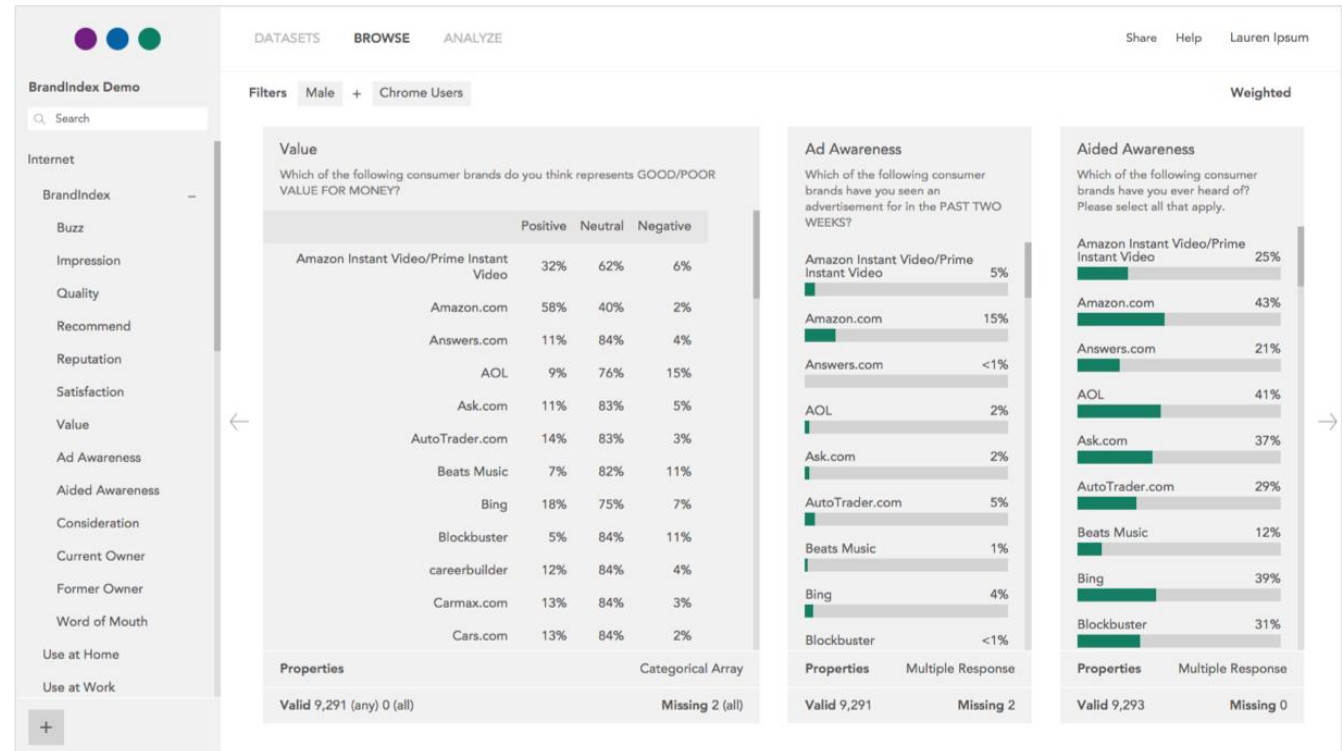
Below the header, there's a list of users on the left: 'All', 'Alejandro Rivera', 'Ben Sully', 'Delia Bailey', 'Gonzalo Rivero', 'Joe Williams', and 'Steffen Weiss'. The main area shows a table of datasets:

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

Below the table, there's a detailed view of the 'Crunch Test Demo' dataset. It includes sections for 'Smartphone Apps', 'Devices Used', 'Mobile Gaming', 'Newspaper Apps', and 'Type'. The 'Smartphone Apps' section asks: 'An "app" is an application that you can download onto your mobile device (e.g., smartphone, tablet, etc.). Approximately how many apps have you downloaded to your smartphone?'. The 'Devices Used' section asks: 'Which, if any, of the following devices do you use to most often browse the internet?'. The 'Mobile Gaming' section asks: 'Do you, personally, currently play video games on a smartphone, tablet, or other mobile device?'. The 'Newspaper Apps' section asks: 'How often, if at all, do you use the following news apps on your smartphone and/or tablet?'. The 'Type' section asks: 'What kind of cell phone do you have? If you have more than one cell phone, then please think about the one you use most often.'.

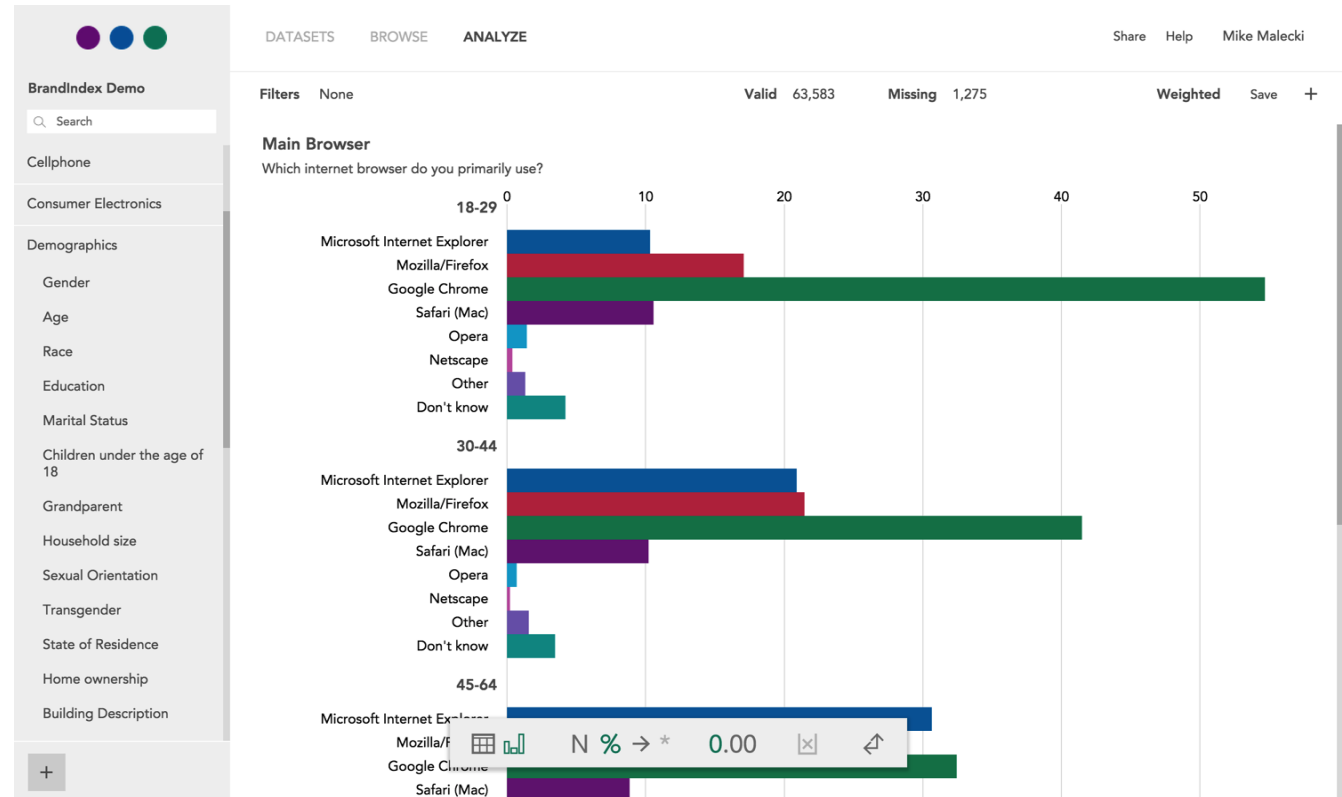
# Explore your data

- 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.



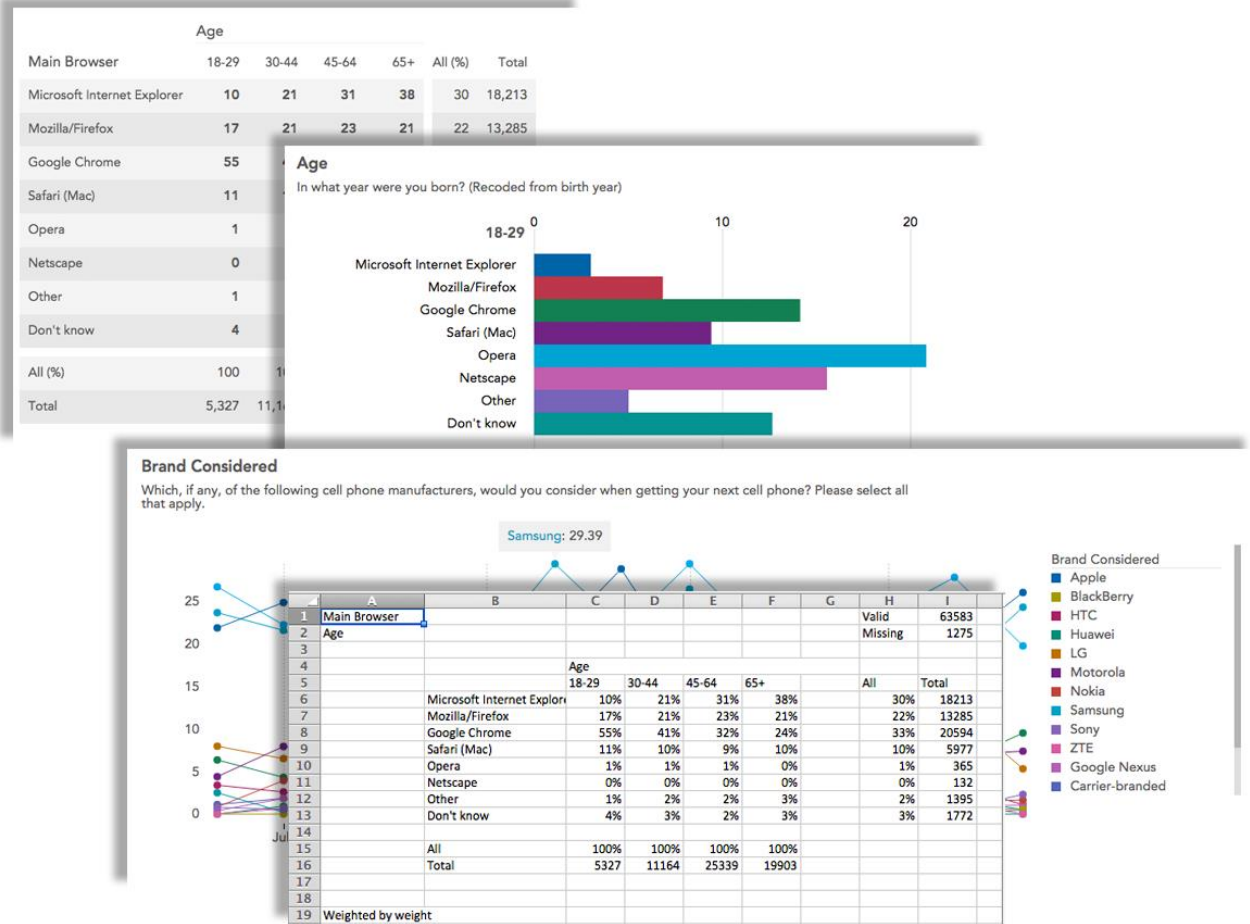
# Create complex analyses

- 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 displays the YouGov Crunch interface. On the left is a sidebar titled 'BrandIndex Demo' with a search bar and a list of categories: Internet, Technology, Media Consumption, Cable and Satellite TV, Cellphone, Consumer Electronics, Demographics, and Date. A plus sign is at the bottom of the sidebar. The top navigation bar includes 'DATASETS', 'BROWSE', and 'ANALYZE', along with 'Share', 'Help', and the user name 'Lauren Ipsum'. The main content area is titled 'Chrome Users' and shows a count of '20,594 of 63,346 (32.51%)'. Below this is a list of browser options under the heading 'Main Browser is any of': Microsoft Internet Explorer, Mozilla/Firefox, Google Chrome (selected with a checkmark), Safari (Mac), Opera, Netscape, Other, Don't know, and No Data. A count of '20,594 of 63,346 (32.51%)' is shown at the bottom of the list. To the right of the list is a large grey box with the text 'Select or drag variable'. At the bottom of the interface are three buttons: 'Save', 'Cancel', and 'Delete'.



# 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 Segments. The main panel has tabs for DATASETS, BROWSE, and ANALYZE. Under the ANALYZE tab, the 'Segmentation' section shows a list of segments: 'Young women' (Count: 3,519 of 64,858) and 'Young men' (Count: 2,193 of 63,346 (3.46%)). The 'Young men' segment is expanded, showing it is defined by 'Gender is any of' (Male selected) AND 'Age is any of' (18-29 selected). Below this, an 'Add Category' section shows 'Other' with a count of 59,826 of 64,858. At the bottom are 'Save' and 'Cancel' buttons.

Segmentation	Count	Definition	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

Gender	Count
is any of	
✓ Male	
Female	
No Data	
Count	31,067 of 63,346 (49.04%)

Age	Count
is any of	
✓ 18-29	
30-44	
45-64	
65+	
Count	5,713 of 63,346 (9.02%)

Other	Count	Status
	59,826 of 64,858	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 Collaborative Insights tool dashboard. The top navigation bar includes the YouGov logo, a 'DASHBOARD' link, and the survey name 'TestingSurvey\_16Nov'. On the right, there are links for 'US', a user profile 'andy.wong', and a menu icon. Below the navigation bar is a search bar with the placeholder text 'Press Enter to search in survey'. To the right of the search bar are buttons for 'Submit to Gryphon', a refresh icon, 'Preview', and 'Save'. Below the search bar is a 'Collapse Content Options' link. The main content area has a welcome message: 'Welcome you can start building your questionnaire!'. Below this message are two large buttons: 'Add Question' and 'Upload CSV'. Between these buttons is a dashed line with the text 'OR'. Below the 'Upload CSV' button is a note: 'Make sure your CSV is in the right format [Learn More](#)'. At the bottom of the main content area is a link: 'Are you a first time user? Take a tour and discover more [Go](#)'. On the left side of the main content area, there are two icons: a document icon and a speech bubble icon. On the right side, there is a vertical scrollbar and a small icon in the bottom right corner.

YouGov

DASHBOARD

TestingSurvey\_16Nov

US andy.wong

Q Press Enter to search in survey

Submit to Gryphon

Preview Save

Collapse Content Options

Prev First 1 Last Next

Welcome you can start building your questionnaire!

Add Question

-----OR-----

Upload CSV

Make sure your CSV is in the right format [Learn More](#)

Are you a first time user? Take a tour and discover more [Go](#)

# Collaborative Insights tool

The screenshot displays the YouGov Collaborative Insights tool interface. At the top, the YouGov logo is on the left, and the user's name 'andy.wong' is on the right. The main header area contains a search bar with the text 'Press Enter to search in survey' and a red button labeled 'Submit to Gryphon'. Below the header, there is a section for 'Collapse Content Options' and a 'Synchronize with Gryphon' button. The main content area shows a survey question 'Q2: What is your favorite sports? (Top 2)'. The question is marked as 'Required' and 'Randomize'. Below the question, there is a list of sports: Baseball, Basketball, Football, Tennis, and Other. Each sport has a checkbox and a corresponding number (1-5). The 'Other' option has a 'Fixed' button and an 'Exclude' button. At the bottom of the interface, there is a 'DISPLAY QUESTION' button and a small icon in the bottom right corner.

Q2 ☒ Required ☒ Randomize

Q2 What is your favorite sports? (Top 2)

1 ☐ Baseball

2 ☐ Basketball

3 ☐ Football

4 ☐ Tennis

5 ☐ Other

[DISPLAY QUESTION](#)



# 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 (or 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 & Shop	Publix	Wegman's
Safeway	Giant	Pathmark	Whole Foods	Kroger

## 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**

USA Today  
Wall Street Journal  
New York Times

**abc**

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

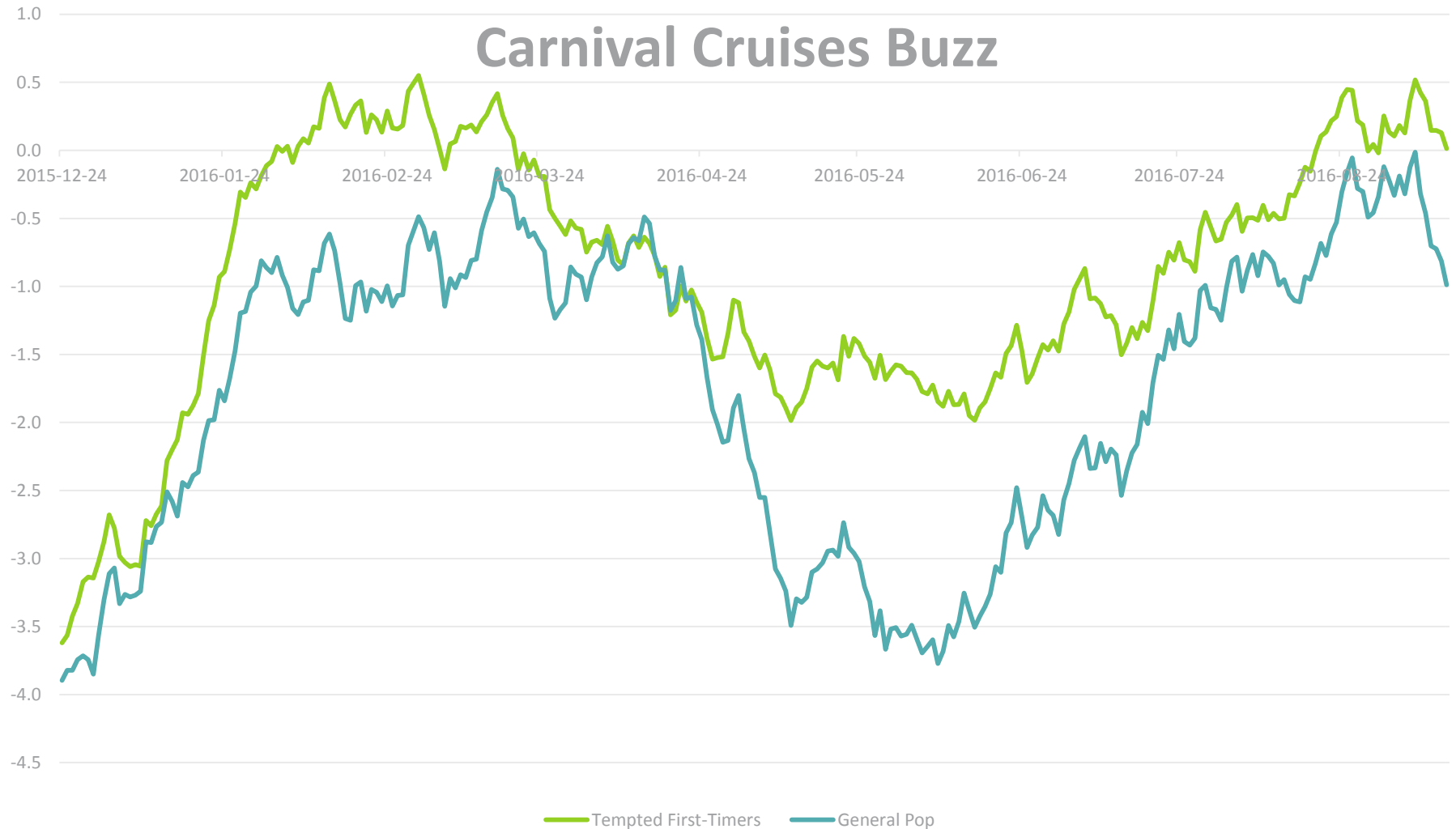


## Programmatic



YouGov

# Track the success through BrandIndex



# 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.