



# Introduction to YouGov's Key Products

**YouGov**<sup>®</sup>  
What the world thinks

# YouGov Products Session

## Purpose of the Day

To demonstrate YouGov's current key products and explain how they fit into our strategy

## Agenda

- YouGov strategy and the role of our key products
- Products
  - BrandIndex
  - SixthSense
  - Omnibus
  - Specialist/local Trackers
- Aligning the product suite
- The Future (including Bloomberg and the YouGov Screen)
- Wrap up
- Short interviews about our trackers for investors (in collaboration with Bloomberg)



## Strengths and Opportunities

### Strengths

- Panel
- Data quality and accuracy
- Speed and flexibility
- Efficiency and cost

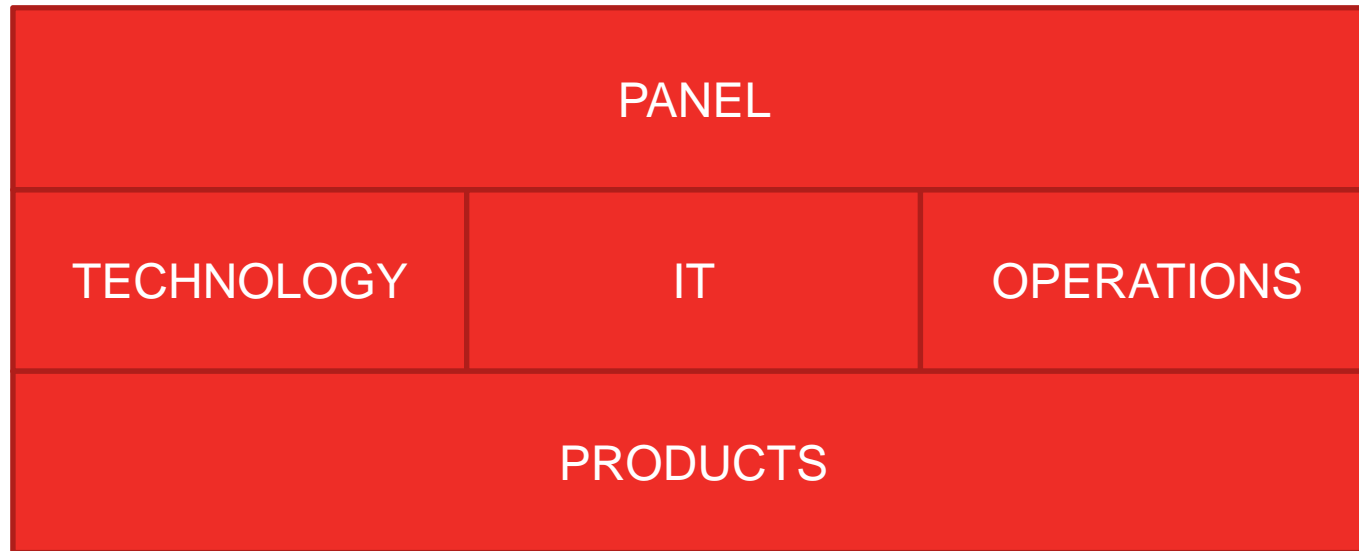
### Opportunities

- These strengths place us in a great position to evolve into a scalable, global, high-margin, product-driven business
- Supported by a first-class custom team that
  - Keeps us close to our clients
  - Allows us to work with clients who require experts to provide consultative support
  - Gets more out of our engine





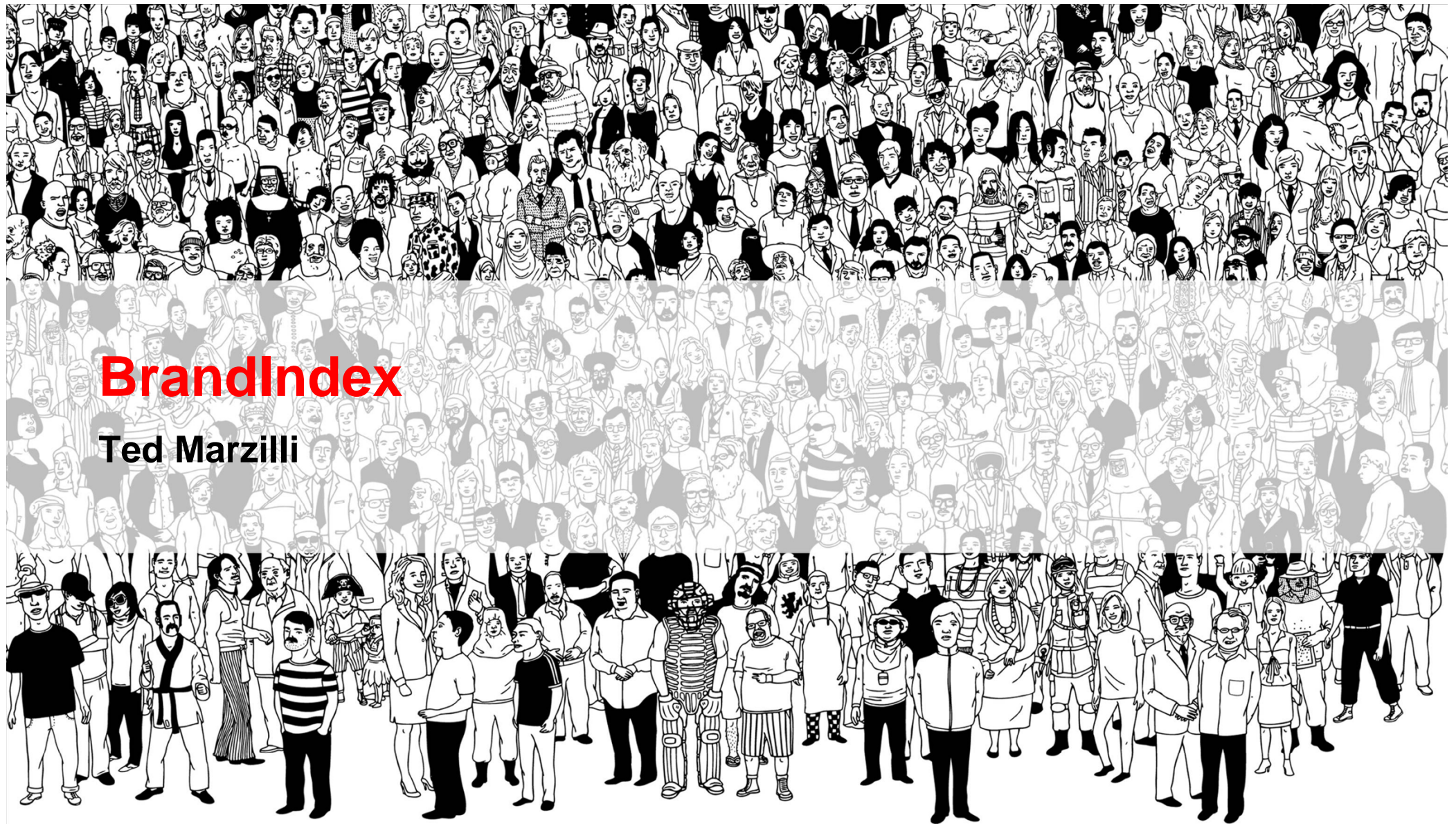
## How the Engine Powers the Business



## What We're Talking About Today...

- BrandIndex
- SixthSense
- Omnibus
- Specialist/local trackers
- Investor trackers (our collaboration with Bloomberg)







# What is BrandIndex?

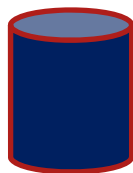
## YouGov Panelists



## BrandIndex Survey



## YouGov Database



## Online Reporting Tool



## 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
05-12-2009	70.1	81.5	130	13	24	167
05-13-2009	72.3	83.8	139	12	24	175
05-14-2009	78.7	92.2	145	6	26	176
05-15-2009	78.3	92.4	140	5	26	172

## A truly unique product

- **Continuous daily data** allows you to get an immediate indicator of consumer response, and helps quantify the magnitude and likely duration of consumer perception shifts in response to campaign activities
- **Breadth of coverage** provides unparalleled ability to benchmark against appropriate competitive set
- **Large daily sample size** enables deep dives into market level results
- **Panelist profiling** on demographics and behavioral measures (e.g., category usage), enabling more detailed and actionable measurement
- **Custom “Trigger questions”** can be inserted into the syndicated questionnaire and enable an additional level of insight behind consumer perception movements





# BrandIndex in a nutshell

## ■ 'Buzz'

Have you heard anything positive / negative about the brand in the last two weeks?

**Attention**  
Recent Awareness

## ■ General Impression

What is your positive / negative impression of the brand?

## ■ Quality

Is the brand of good or poor quality – irrespective of price?

## ■ Value

Do you believe the brand to offer good / poor value for money?

## ■ Satisfaction

Are you a recently satisfied / dissatisfied customer of the brand?

## ■ Recommend

Would you recommend this brand to friend / tell them to avoid it?

## ■ Corporate Reputation

*(Found by a proxy)* If you worked for the brand in the same role that you presently have, would you be proud / embarrassed to work for this brand?

**Index**  
Your overall  
Brand Health



# The survey questionnaire

YouGov What the world thinks



Now which of the following have you heard something **NEGATIVE** about over the PAST TWO WEEKS?

Please choose as many brands as you like. Click to select and click again to deselect.

Mitsubishi	Skoda	Volkswagen	Rolls Royce	Proton
Saab	Peugeot	MINI	Noble	TVR
Smart	Range Rover	Vauxhall	Rover	Renault
Suzuki	Nissan	MG	Volvo	Subaru
Morgan	Porsche	Seat	Toyota	Tata



# Why BrandIndex is valuable to clients

## Brand Health Tracking

- Replacement/compliment for former internal tracking system
- Reputation and crisis management

## Marketing Effectiveness

- Measure message breakthrough
- Metric lifts during/after campaigns

## Competitive Analysis

- Identify competitive opportunities and threats
- Gain learning from successes and failures of peers and/or best of breed brands from any industry

## Analytics and Modeling

- Data has crossed the two year threshold for usage in analytics/modeling
- BrandIndex data can be a valuable input marketing mix modeling or as a weather feed





12

# Apple's buzz over the Summer



iPhone 4 announced



iPhone 4 released



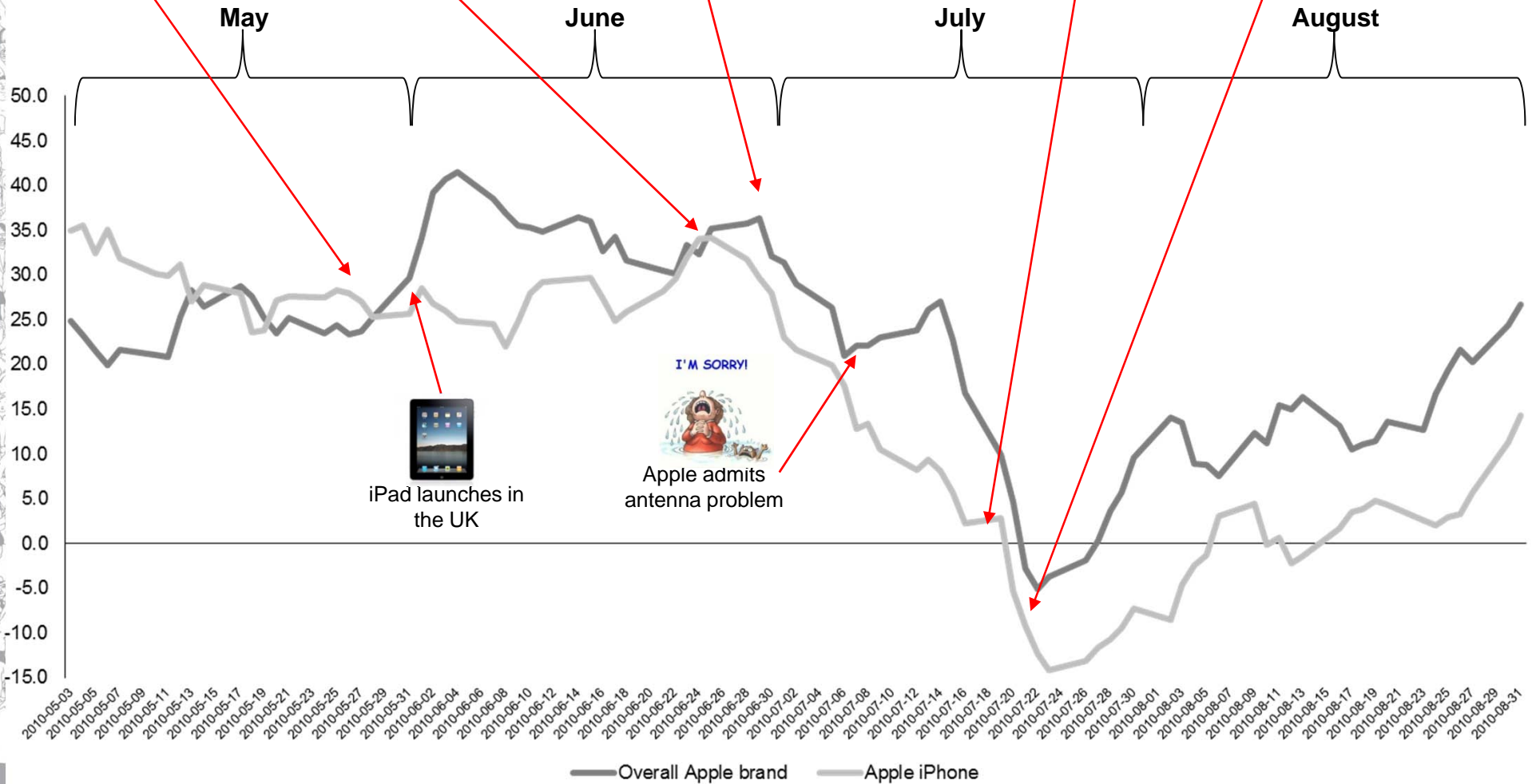
Steve Job tells iPhone 4 users to hold it differently



It comes out that the covers cost Apple \$1 to produce and \$29.99 to sell



Buzz starts to increase after Apple decides to give out free covers



Source: YouGov Brand Index

**YouGov**

## Testimonials:

***"Now we can measure the effectiveness of our campaigns in real time"***

*Chairman, International Communications Agency*

***"At last, a service which removes my reliance on 6 monthly sector reports!"***

*Marketing Director, Major High Street brand*

***"We use BrandIndex every day"***

*Insight Team, Major National Utility*

***"BrandIndex closely matches our existing tracking data"***

*Marketing Director, Global Bank*

***"We find Brand Index is a very sensitive and powerful tool for understanding consumer responses in a fast changing market place. If a story breaks in the media on a Monday morning then we know the consumer response on Tuesday. Our other research suppliers come back six weeks later!"***

*UK Marketing Director, Major Multi-National Brand*









1

# What is SixthSense?

# What is SixthSense?

## Written reports packed with consumer data

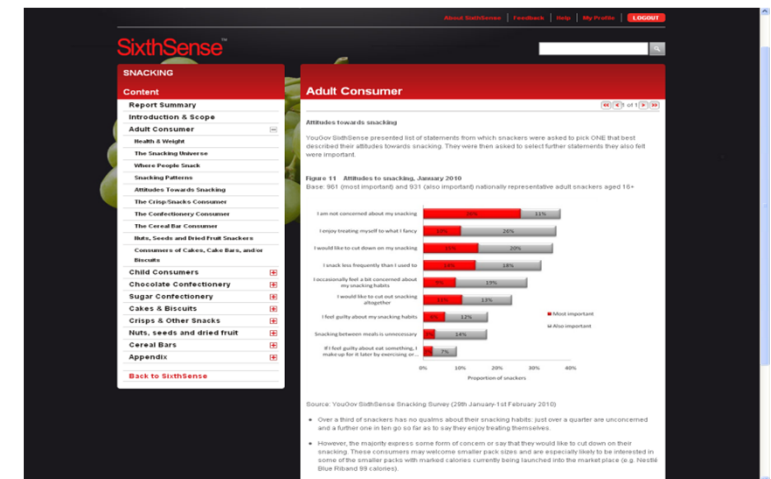
- Unique findings
- Highly qualified writers
- Market analysis, brand maps, forecasts

## Building an extensive portfolio

- Finance, Tech, Health & Beauty, Leisure
- Over 150 reports to date
- Re-cutting content

## Changing the report paradigm

- Reports not static
- Typically 10x original consumer research
- Updates create new sales opportunities





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## How it works



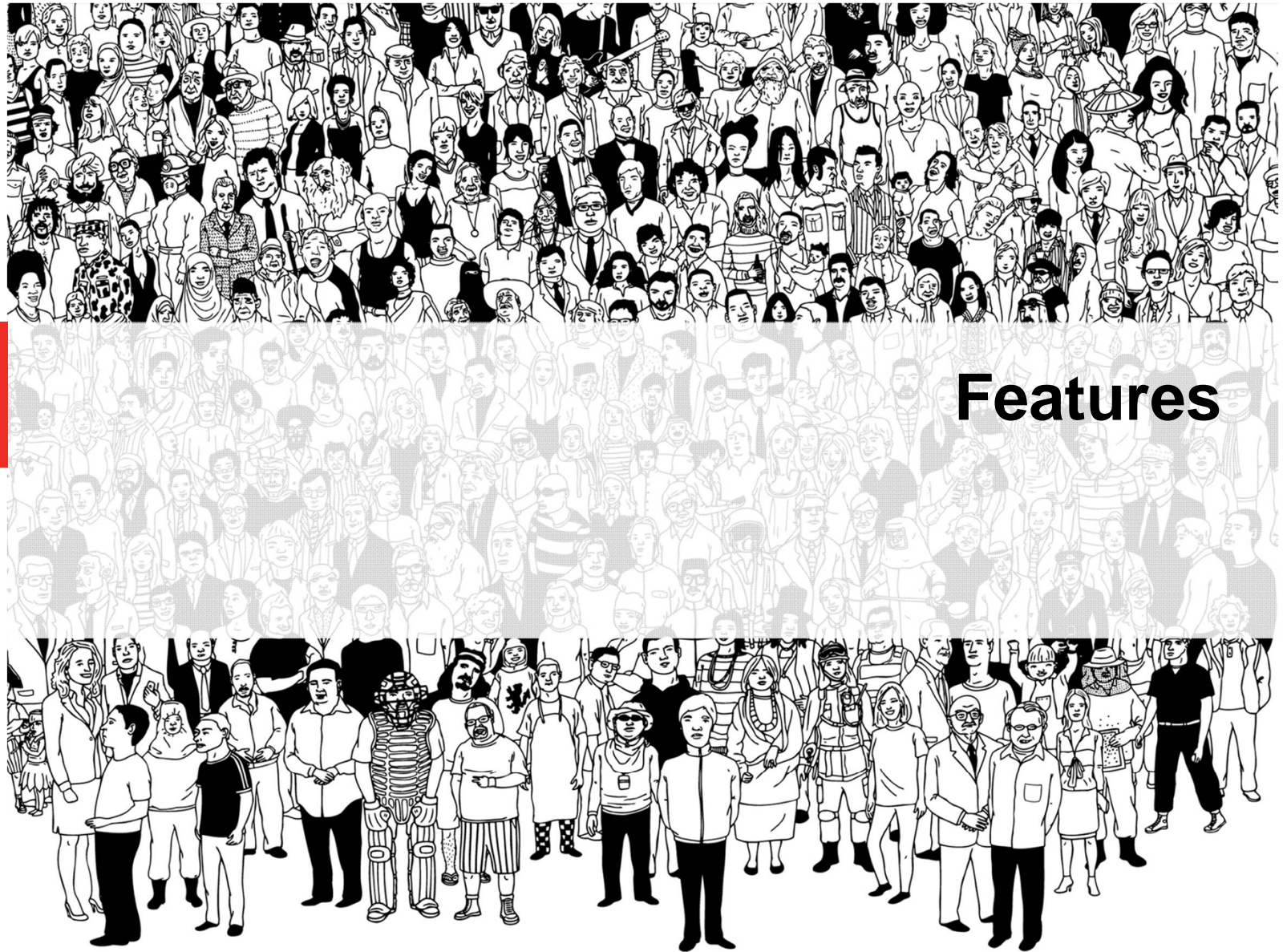
## The SixthSense business model

- Harnesses a number of core YouGov research strengths
- Written by a team of 30+ freelance expert analysts
- Economics favours YouGov vs competition:
  - Cost of creating each report much lower
  - Update process creates a dynamic environment where reports evolve
  - Pricing at top end of report range, whilst building a substantial client base (130 new clients since launch).
- Sold by a telesales team with aggressive KPIs
- Additional benefit of creating extra enquiries and sales for other parts of the business

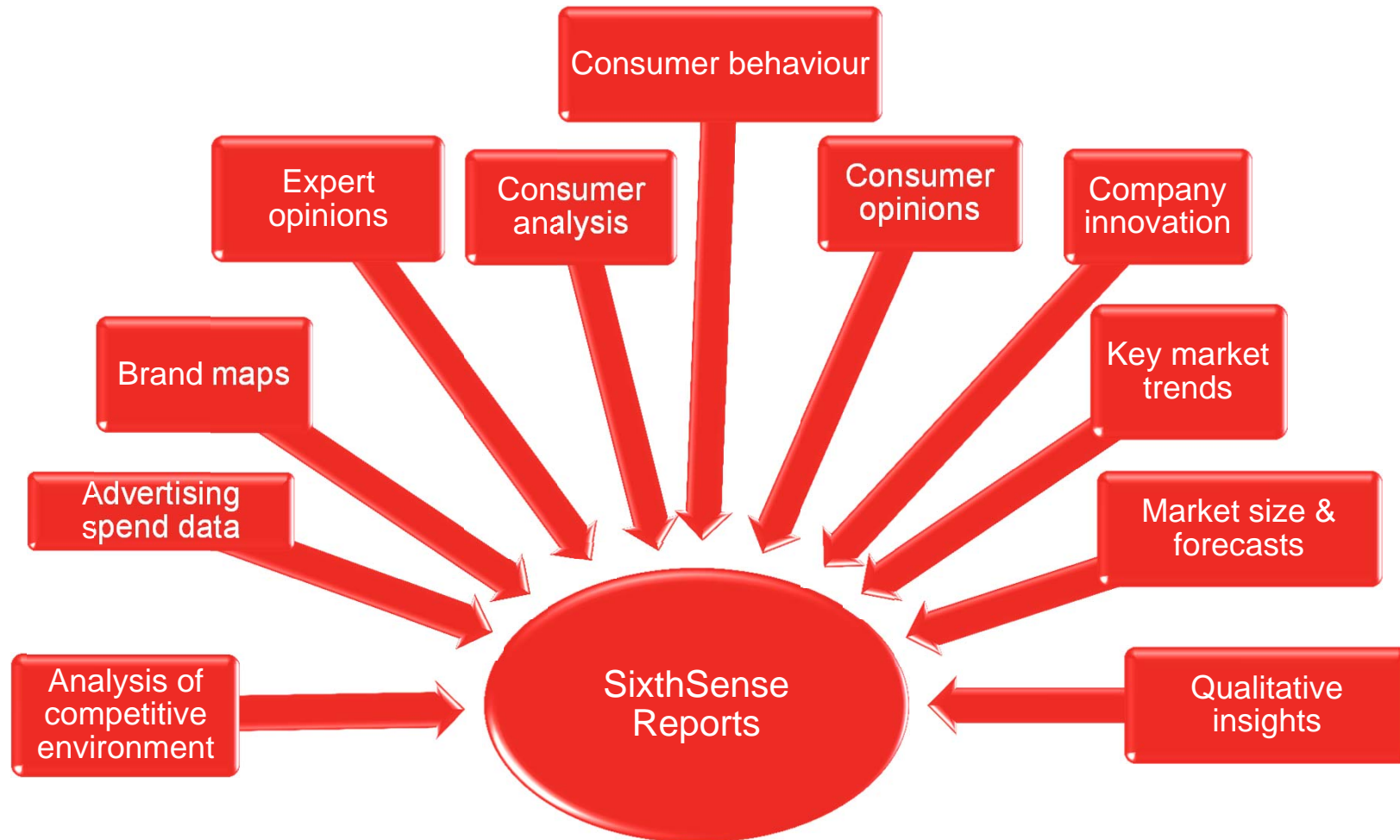


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# Features



## What's included in a SixthSense report?





4

**Clients**



## Who Buys SixthSense Reports?

- **‘Insiders’ vs ‘Outsiders’**

- Insiders
- Outsiders

- **Job Functions**

- Mostly: Marketing, Consumer Insight, Strategy, Research
- But also: CEOs, HR, Economists, Students

- **Benefits**

- Competitive Analysis, Market Shares, Forecasting, Customer Targeting





5

## Future Plans



## Future Plans

- More detailed, specialist and technical reports
- More sectors: Automotive, Energy, Travel, Food Services...
- Building breadth and depth of client base
- Much larger package sales due to portfolio effect
- Continue to build platform in UK, then roll out to new geographies
- Capture significant market share from Mintel and Datamonitor





# Omnibus and Tracker Products

Tim Britton



Every weekday (excluding public holidays) we interview a nationally representative sample of adults aged 18+. Clients choose from 1,000 responses in 24 hours or 2,000 responses in 48 hours

## 24hr service

**1,000 RESPONDENTS RESULTS IN 24hrs**

<b>Respondents:</b>	1,000 GB adults (aged 18+) nationally representative
<b>Frequency:</b>	daily (Monday to Friday)
<b>Results delivered:</b>	in 24 hours (Monday to Friday)
<b>Cost:</b>	£700 entry fee £300 per standard question

## 48hr service

**2,000 RESPONDENTS RESULTS IN 48hrs**

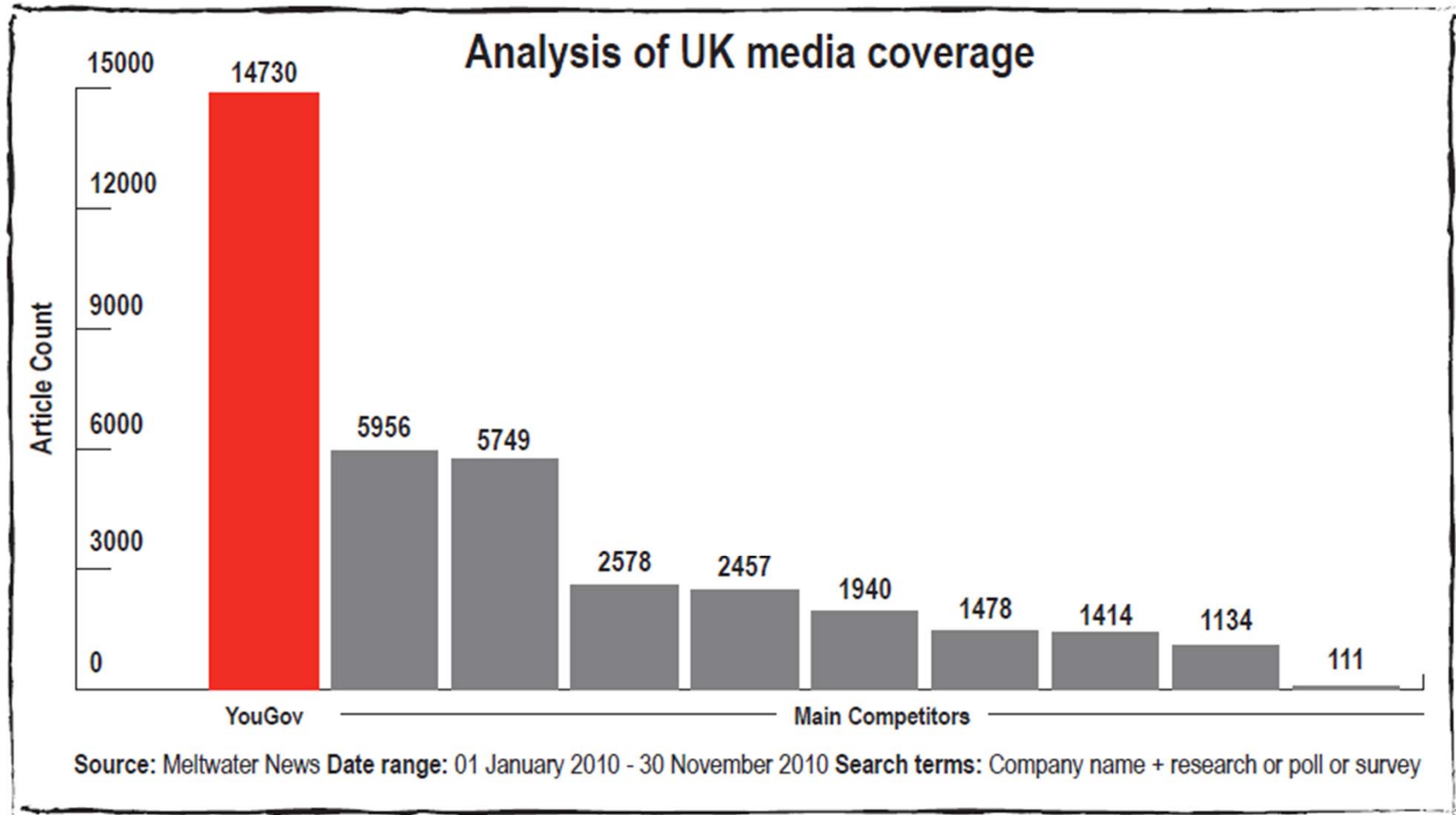
<b>Respondents:</b>	2,000 GB / UK adults (aged 18+) nationally representative
<b>Frequency:</b>	daily (Monday to Friday)
<b>Results delivered:</b>	in 48 hours (Monday to Friday)
<b>Cost:</b>	£200 entry fee £300 per standard question



- Rate card prices for questions units
  - Standard questions allow up to 10 answer options or 2 statements answered against a scale
  - Additional answer options are available for a fee
  - Open-ended questions are £325 each
- No minimum number of questions
- Costs cover questionnaire design and data tabulations including analysis by gender, age, region, social class, children in household, working status and marital status
  - Additional analysis is available on request



## YouGov: the most quoted UK market research agency



# Specialist omnibus services



## MPs

- 100 MPs, representative of the House
- Quarterly, results in 2 weeks
- Free entry, £925 per question

## Wales

- 1,000 Wales residents aged 18+
- Weekly, results in 48hrs
- Entry fee £200, £400 per standard question

## Parents

- Parents of children aged 16 and under
- Timings and costs dependent on number of respondents required

## London

- 1,000 London residents aged 18+
- Twice per week, results in 48hrs
- Entry fee £200, £400 per standard question

## Children

- 500 children aged 8 to 15 in Great Britain
- Weekly, results in 4 days
- Entry fee £400, £600 per standard question

## Scotland

- 1,000 Scotland residents aged 18+
- Twice per week, results in 48hrs
- Entry fee £200, £350 per standard question

## Business

- 500 small business decision makers
- Weekly, results in 72hrs
- Entry fee £400, £650 per standard question


## Qual

- Qualitative insight with quantitative sample sizes
- Analysis of the responses and delivery of a brief report summarising the principal points of interest

## International



## Types of client / types of work



PR agencies  
End client companies



PR hook / lobbying purpose

PR / Ad agencies  
Consultancies



Client understanding: pre  
pitch / thought leadership

End clients  
Consulting agencies



Internal insight for  
commercial planning  
purposes

## Survey finds opposition to privatisation of forests

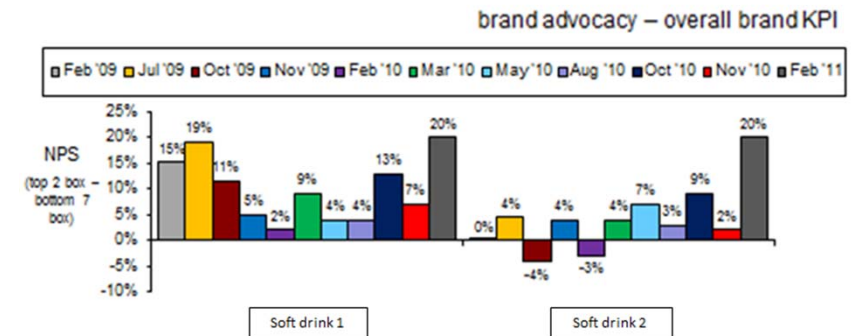
A majority of the public opposes plans to sell some of England's forests, a survey suggests.

Three-quarters of the 2,000 polled by YouGov for the 38 Degrees pressure group said they were against the plans.

Ministers want to transfer power from the Forestry Commission, which owns 18% of woodlands, to the private sector, saying this will boost public control.



The Forestry Commission has 150,000 hectares of land in England

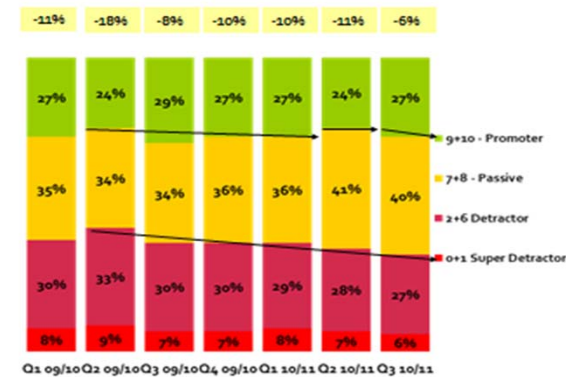


Question: 'Fasted, how likely would you be to recommend brand's products to someone else?'

Source: YouGov brand & comms tracker

Base: Feb '11 - all chilled fruit juice buyers who have ever bought brand - 1502 Innocent, 1762 Tropicana

## Relationship NPS Quarterly Progress



- End of year target is -5%
- After an increase in the number of promoters and drop in the number of detractors, the overall NPS this quarter is one percentage point away from reaching the end of year target.

Tech company

## Other syndicated offers

- Debt Tracker (UK)
- American Pantry Study (US)
- Hospital Index (US)
- Affluence and Wealth Tracker (US)
- Health 'n' Food Tracker (Nordics)
- The Role of Social Media in Financial Services (Germany)





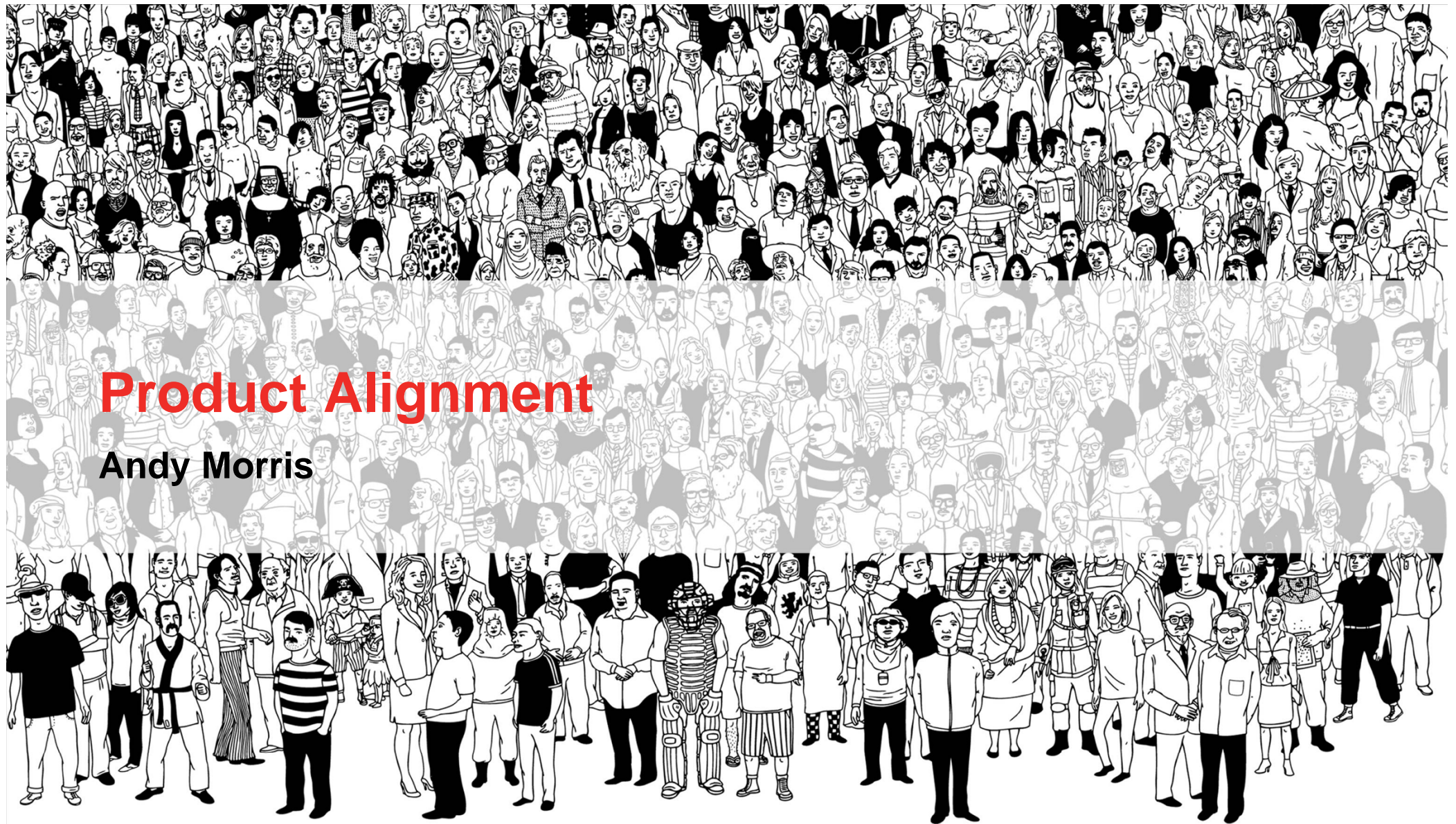
## The current Tech & Telco syndicated products

- **DongleTrack:** 2000 mobile broadband users every quarter and a 2000 nationally representative survey. A satisfaction, usage and attitude tracking programme.
- **The Smartphone:** Mobile Internet, eXperience (SMIX): 2000 smartphone owners and a 2000 nationally representative survey, looking at handsets, mobile operators, renewal, churn, operating systems and the use of apps.
- **iPhone iTrack:** 1000 iPhone users every 6 months. Why? The Apple brand can over inflate satisfaction, usage and attitudinal behaviour with a particular network operator. iPhone iTrack looks to measure and understand behaviour of iPhone owners to ultimately answer the question... Which network operator is better?
- **Tablet Track:** launched in August 2010. Understanding the iPad market (currently). This will expand when new consumer electronic companies launch tablets. Over 700 iPad owners and a 2000 nationally representative survey. Looking at usage, attitudes, satisfaction, take up of 3G devices, operator performance etc. Who do these devices attract?









# Product Alignment

Andy Morris



## From Great Products to an Aligned Product Suite

First the basics – use “product A for this” and “product B for that”, piece them together to complete the research jigsaw



## From Great Products to an Aligned Product Suite

Go further – the jigsaw becomes 3D when you recognise that products A and B may answer different questions but the answers are enriched when they are fed into each other





# The YouGov Product Proposition

“What The World Thinks...”

- **About your brand(s) and competitors** – BrandIndex, TellYouGov
- **About your sector** – SixthSense, Trackers
- **About your environment** – HEAT, economic trackers
- **Ask the world** – Follow-ups to products + Omnibus + Methodologies + Custom Research
- **What it means** – Consulting teams





# An Example: The Tech and Telco Toolkit

## Brand-based Syndicated Reports & Trackers

BrandIndex (global)

BrandIndex end of year reports (Germany)

TellYouGov (UK)

## Sector-based Syndicated Reports & Trackers

SixthSense reports (UK)

- Pdas/Mobile phones
- Apps
- Consumer Electronics
- Home Entertainment

Dongle Tracker (UK)

Smartphone Tracker (UK)

Tablet Tracker (UK)

Iphone Tracker (UK)

3DTV Tracker (UK)

Digital Publishing Industry (US annual)

Speed Testing (UK)

## Economy-based Syndicated Reports & Trackers

HEAT – household economic confidence (UK, US)

Prosperity Index – household economic confidence (UK)

Corporate Confidence Tracker (UK)

Debt tracker (UK)

Recession tracker (UK)

Platinum – high worth (UK)

Study of Affluence and Wealth – top 10% (over \$100K) (US)

Study of middle-class households – over \$50K (US)

Political work – government satisfaction

## Omnibuses

Nat rep (all hubs + more)

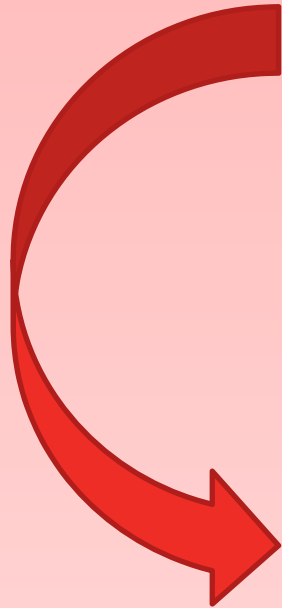
Regional Omnibuses (UK)

B2B Omnibus (UK)

Qualibus (UK)

MP Omnibus (UK)

## The Power of Panel



HEAT – household economic confidence (UK, US)



Tablet Tracker (UK quarterly)

BrandIndex (global)



TellYouGov (UK)





## Innovations/New Products

- Continued innovation remains core
- Development of existing products based on client feedback and needs
  - e.g. BrandIndex
- Development of new products to enhance the suite
  - The YouGov brand
  - The YouGov people
  - The YouGov engine
- 2010 = SixthSense, Bloomberg investor trackers, greater panel interactivity
- 2011 = C-suite dashboard, YouGov screen



## The YouGov screen and Bloomberg

- The vision of a YouGov screen is being realised
- In conjunction with Bloomberg, we are running a series of economic and sector-based trackers aimed at investors
  - HEAT is an economic confidence tracker in the US, UK and now China
  - HOT is a residential real estate optimism poll running in the US
  - UK HEAT & US HOT both now appear on the Bloomberg terminal
- Sector-based trackers were launched in the US last year. UK trackers launched this month
- Deliverables = data + short reports examining spend within sectors by brand, switching likelihood, etc.
- Further expanding our offering (locally and globally) so that we are producing the volume of syndicated research necessary to make a YouGov screen viable



# Reports business will introduce YouGov to new clients and industries ...

**Bloomberg OpinionIndex**  
by Bloomberg//YouGov

## US Retail Industry

October 2010

### Shoppers Scaling Back

Consumers expecting to shop less over the next 30 days

Shoppers are slowing down their trips to the mall—with 27% saying they plan to shop less over the next 30 days than the past (versus 9% increasing their shopping. This is, however, slightly better than August, where 34% said they were going to scale back on their shopping. Looking at selected stores, we see the same

### Winners and Losers in the report

- Looking up: COST, WMT, KSS, OMS
- Looking down: SHLD, ROST, ODP, BBBY

### Highlights

- Negative outlook still present; shoppers expecting to scale back, but downward momentum slowing from August

## Sector reports

- Introduces YouGov to investors particularly those in equity, corporate debt
- Enhances offering to corporate clients with competitive data

**Bloomberg OpinionIndex**  
by Bloomberg//YouGov

## January 2011 Household Economic Activity Tracker

January 2011

### China, US, UK

China Continuing to Roar; US Starting to Improve; UK Still Sluggish

The Chinese economy continues taking off – driven by the strength of its young workers. Coming on the heels of Chinese President Hu Jintao's visit to the United States, Bloomberg//YouGov interviewed online consumers across the US, UK, and China over the past month (a representative sample of internet users were interviewed in each of the 3 geographies). The differences – and similarities – in consumers' economic attitudes are striking.

### Highlights

China's consumers showing great strength and are very optimistic about 2011 vs. US & UK consumers

- Younger workers driving China's economic dynamism – majority of 18-34 year olds expecting improvement in employment income, savings, and overall financial situation
- In all 3 geographies, younger workers

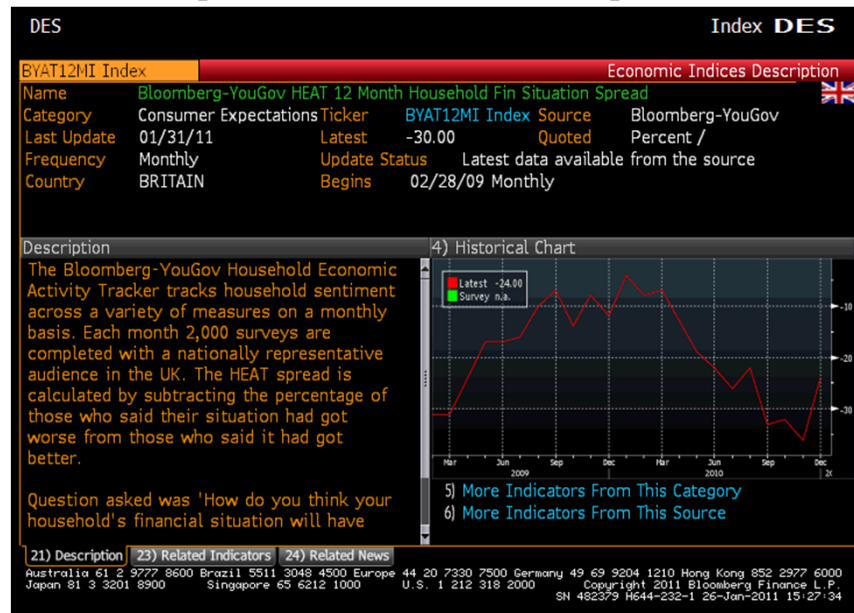
## Global-macroeconomic reports

- Introduces YouGov to global-macro investors
- Opens up cross-geography comparisons valued by multinational clients, governments, and leading media organisations





## ... and screens of YouGov data are already being used to expand our footprint



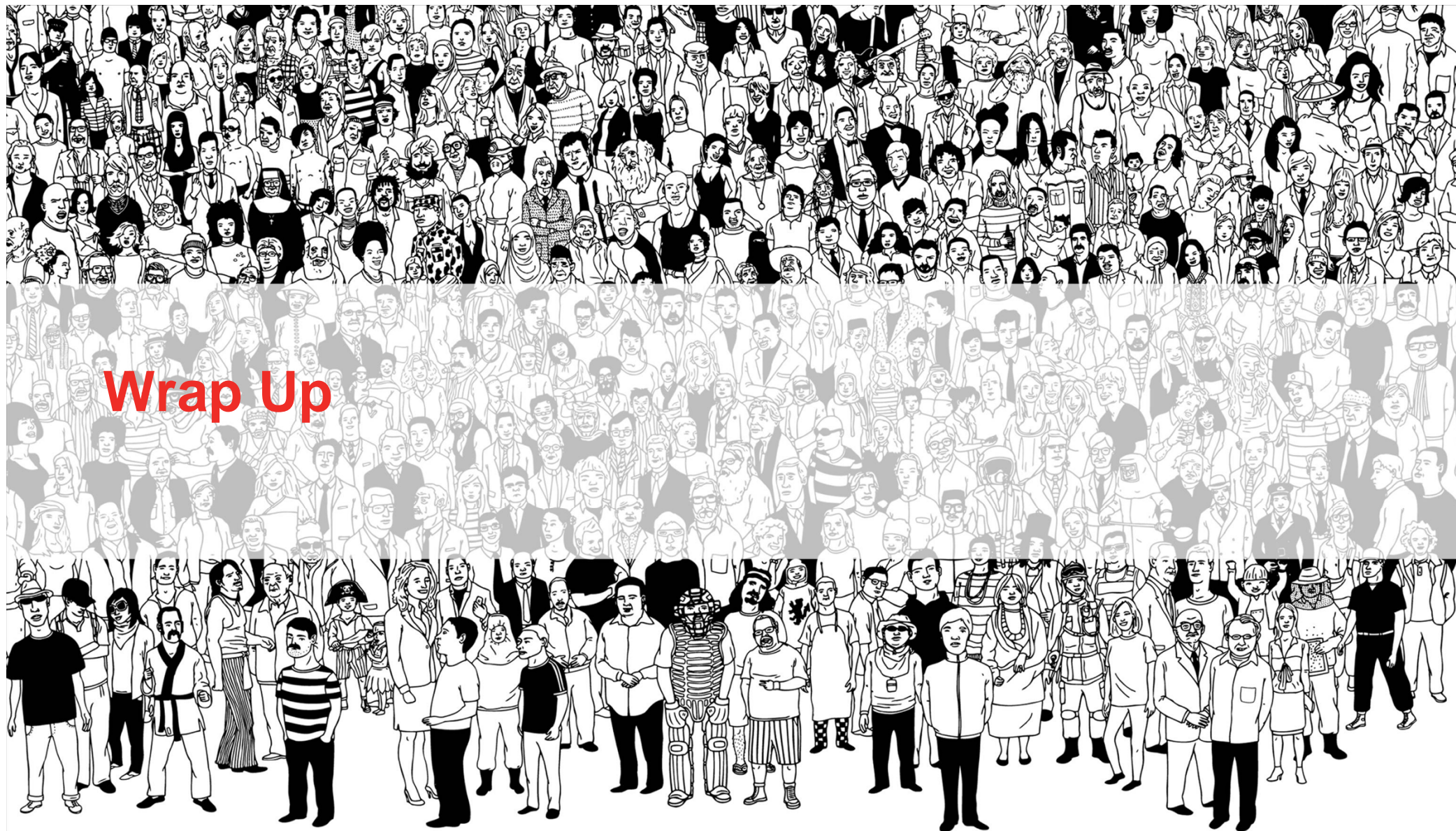
### Household Economic Activity Tracker (HEAT)

- Monthly measure of UK consumer activity and optimism
- Bloomberg terminal has historical data since Feb. 2009
- Go to BYAT12MI on a Bloomberg terminal for more



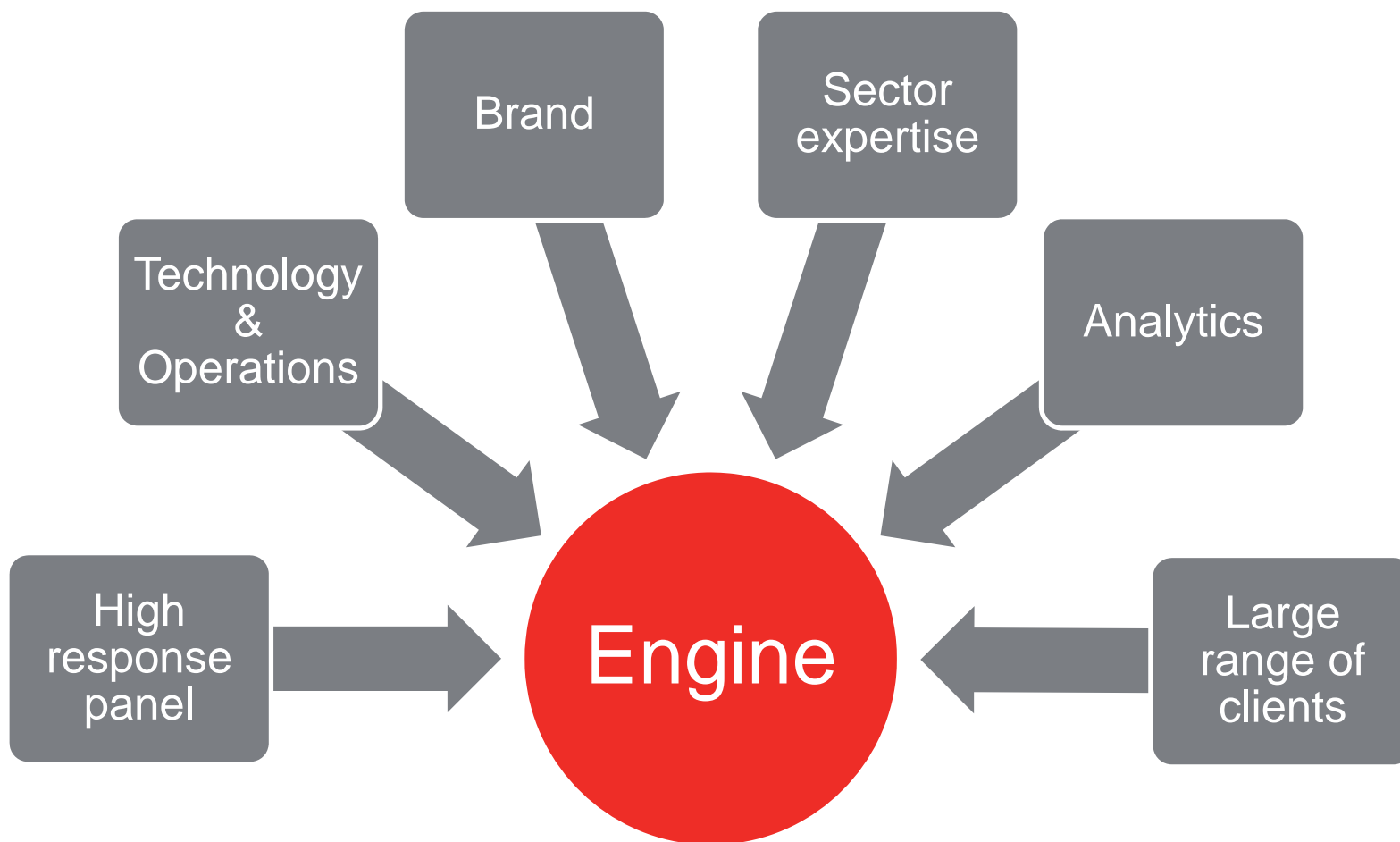
### Housing Optimism Tracker (HOT)

- Weekly measure of US residential real estate outlook
- Bloomberg terminal has historical data since Dec. 2009
- Go to BHOTINDX on a Bloomberg terminal for more





## Getting more out of the engine we've built





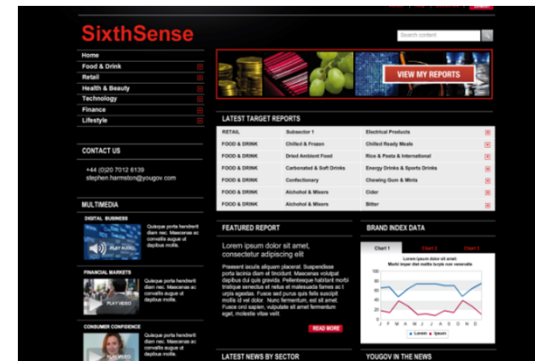
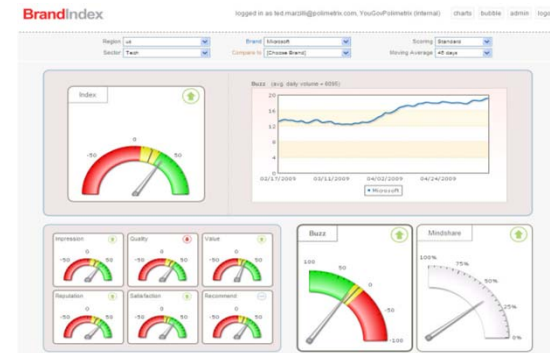


# Dashboard

# NEW

# Reports

# Custom Research



## Summary

- Our core strengths enable us to evolve to a panel-and-product driven business with a consultancy base
- We have great products that can stand alone...
- But they become more powerful when aligned into a cohesive product suite
- Continued innovation is at the heart of our strategy
- The alignment of our brand, our products and our relationships offers great potential

