

Introduction to YouGov's Key Products

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

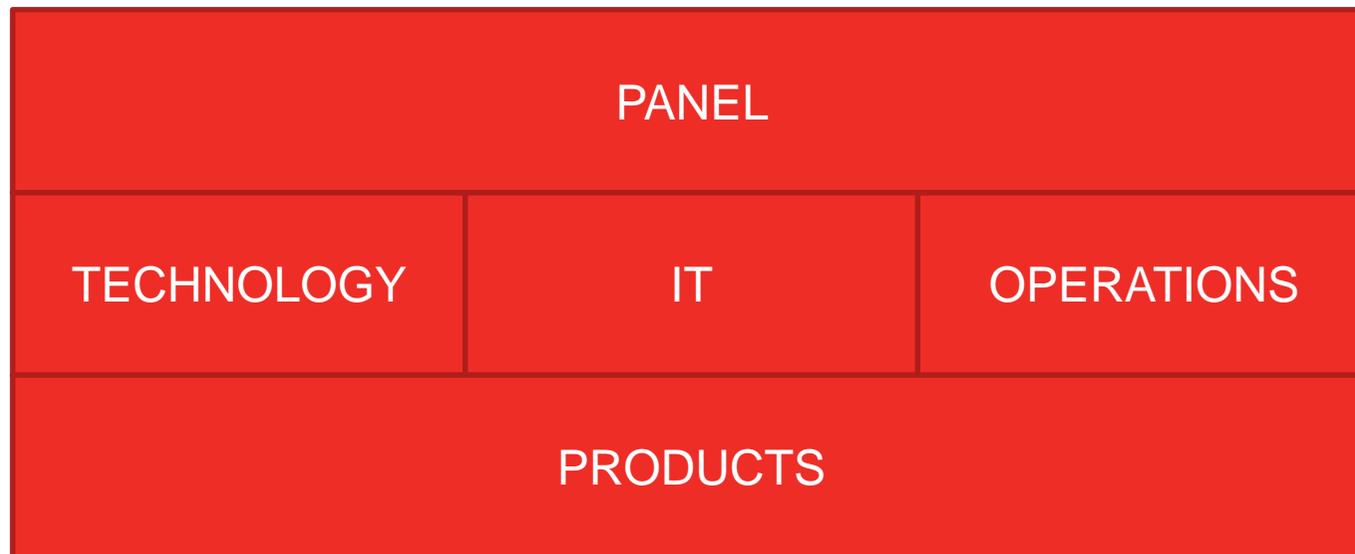
- Panel
- Data quality and accuracy
- Speed and flexibility
- Efficiency and cost

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)





BrandIndex

Ted Marzilli

What is BrandIndex?

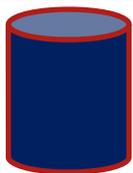
YouGov Panelists



BrandIndex Survey



YouGov Database



Online Reporting Tool



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	
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?
- **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?

Attention
Recent Awareness

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



Apple's buzz over the Summer



iPhone 4 announced



iPhone 4 released



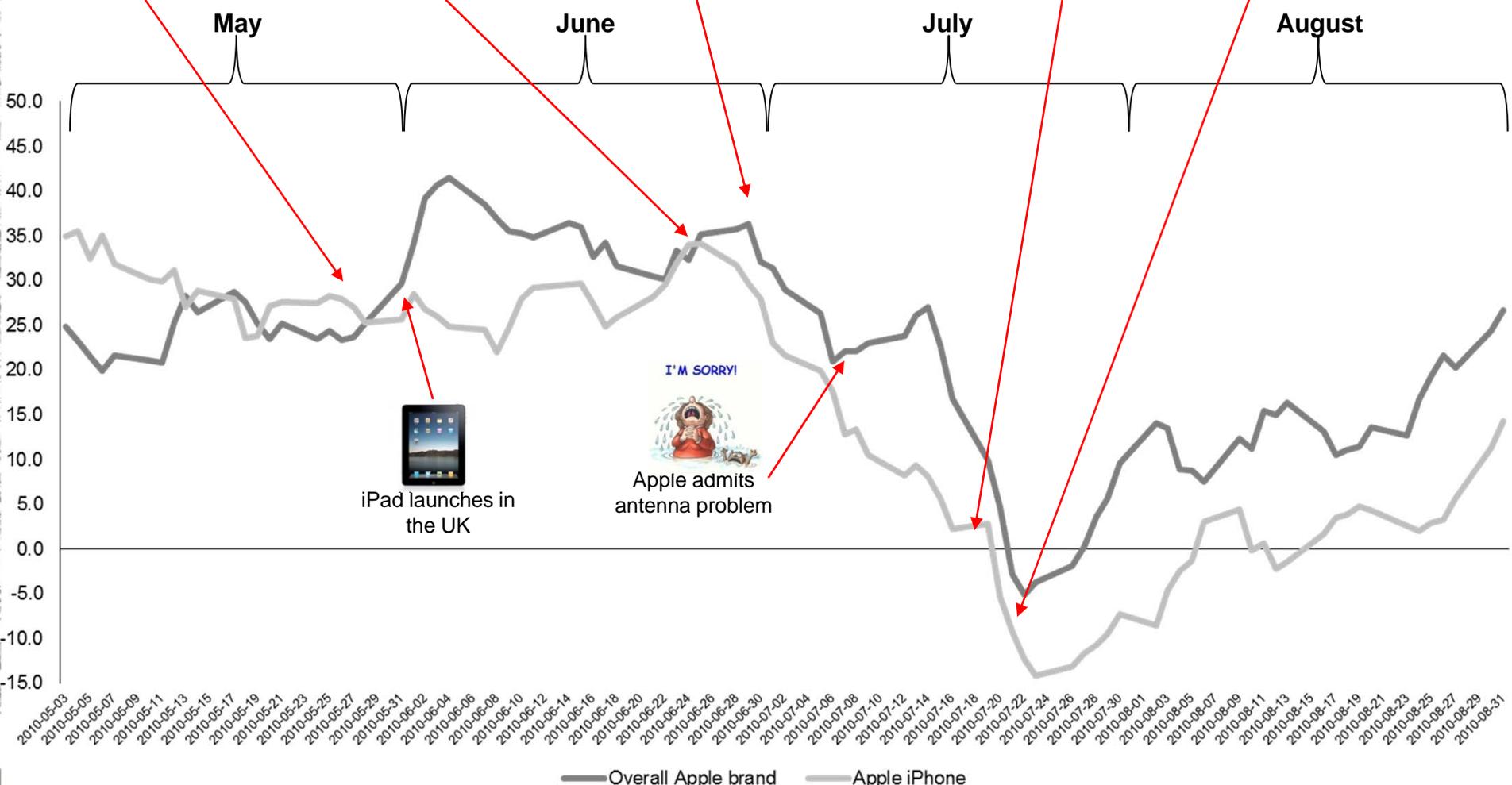
Steve Job tells iPhone 4 users to hold it differently



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



— Overall Apple brand — Apple iPhone

Source: YouGov Brand Index

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





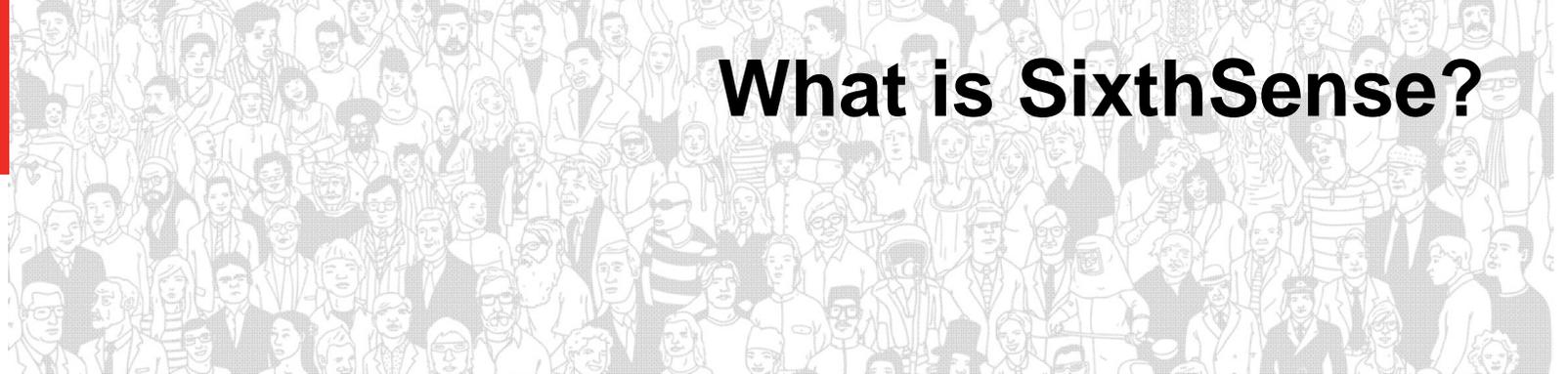
SixthSense

Stephen Harmston



1

What is SixthSense?



What is SixthSense?

Written reports packed with consumer data

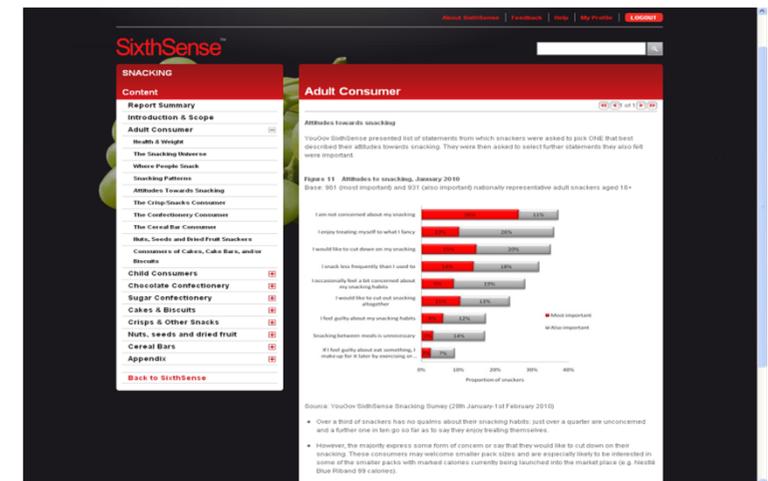
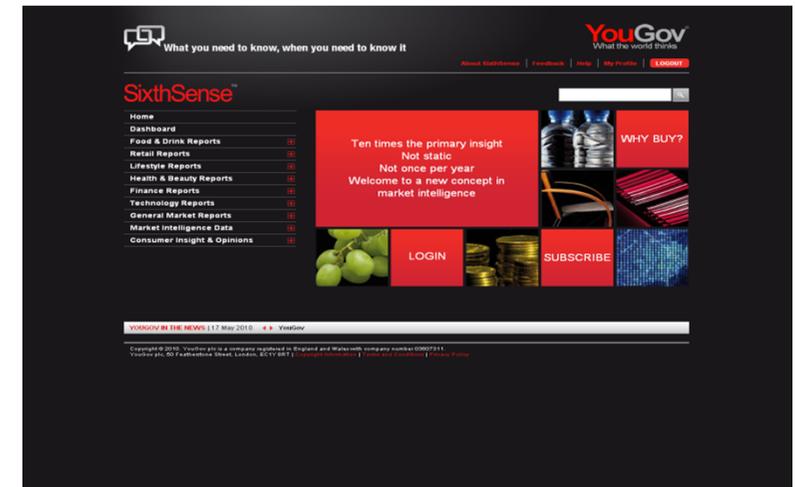
- Unique findings
- Highly qualified writers
- Market analysis, brand maps, forecasts

Building an extensive portfolio

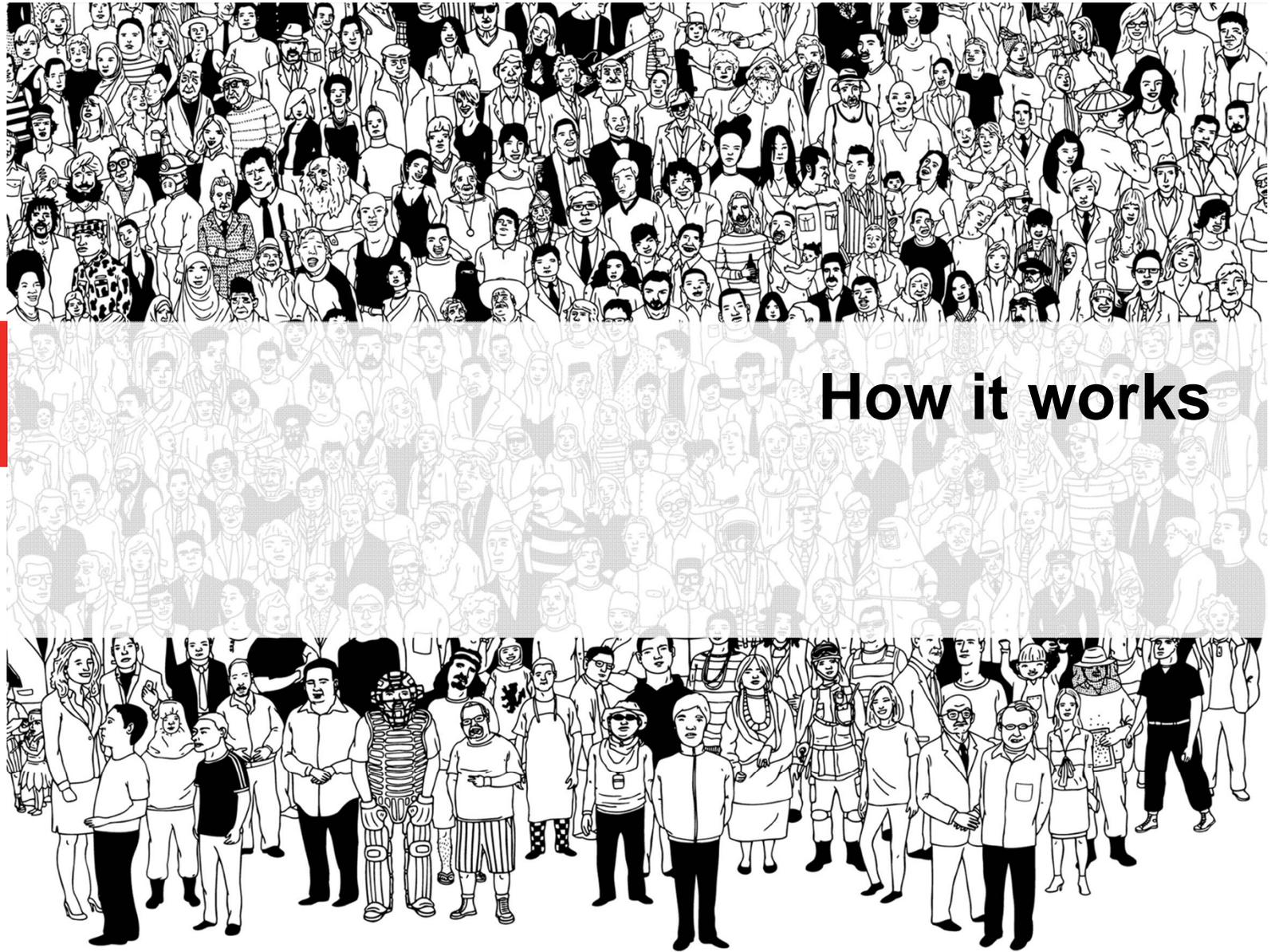
- Finance, Tech, Health & Beauty, Leisure
- Over 150 reports to date
- Re-cutting content

Changing the report paradigm

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



2



How it works

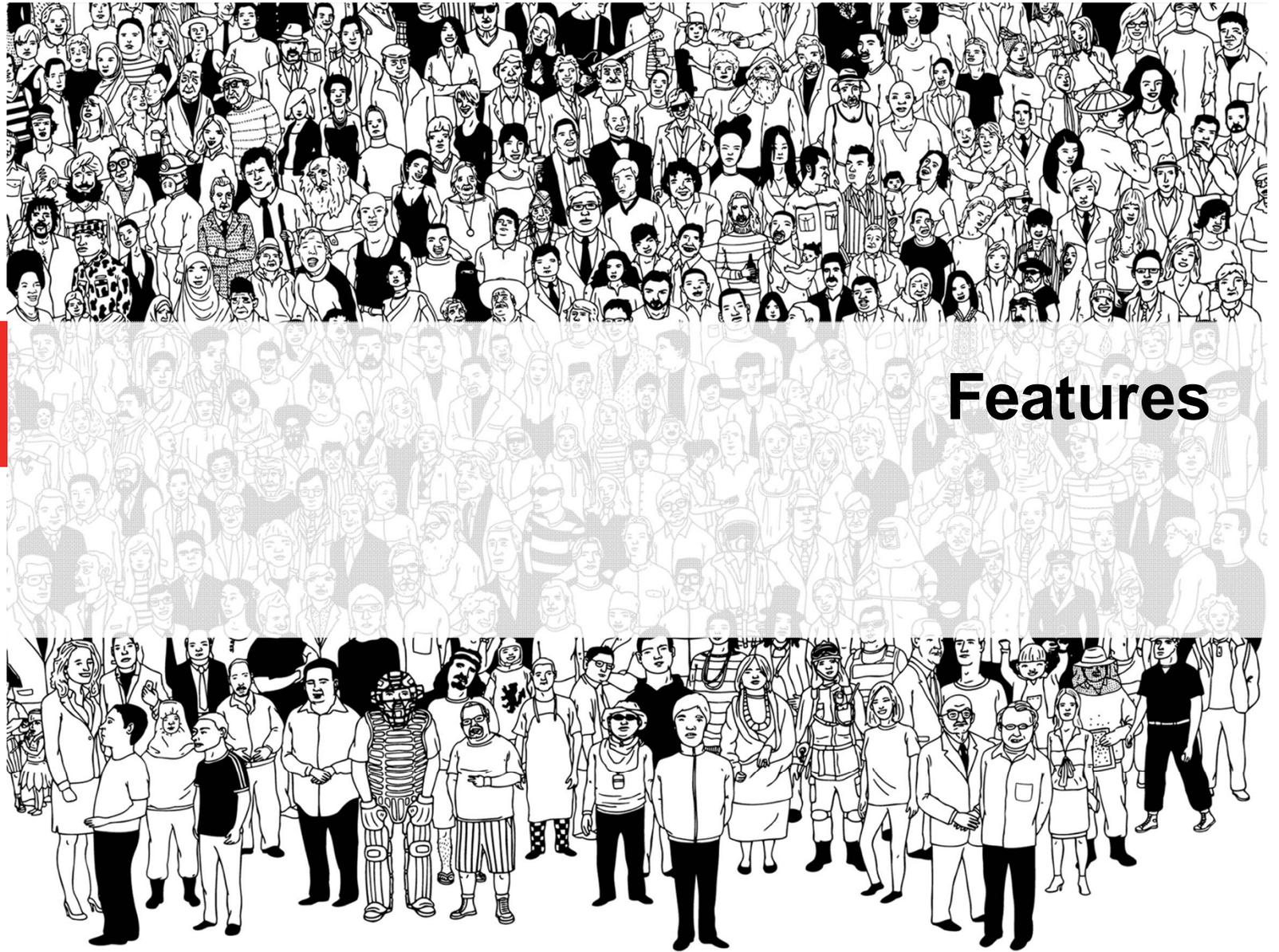
The SixthSense business model

- 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



3

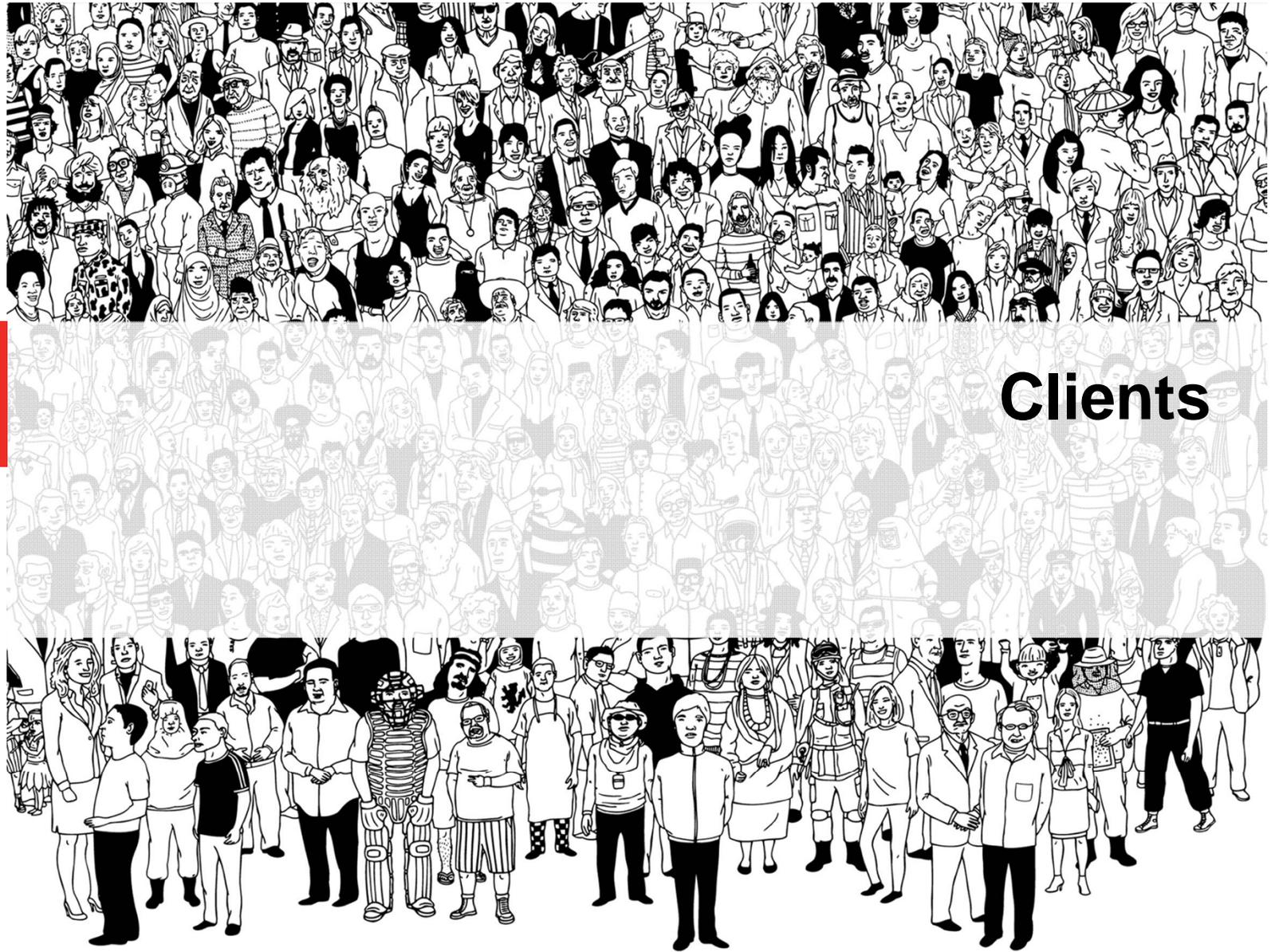
Features



What's included in a SixthSense report?



4



Clients

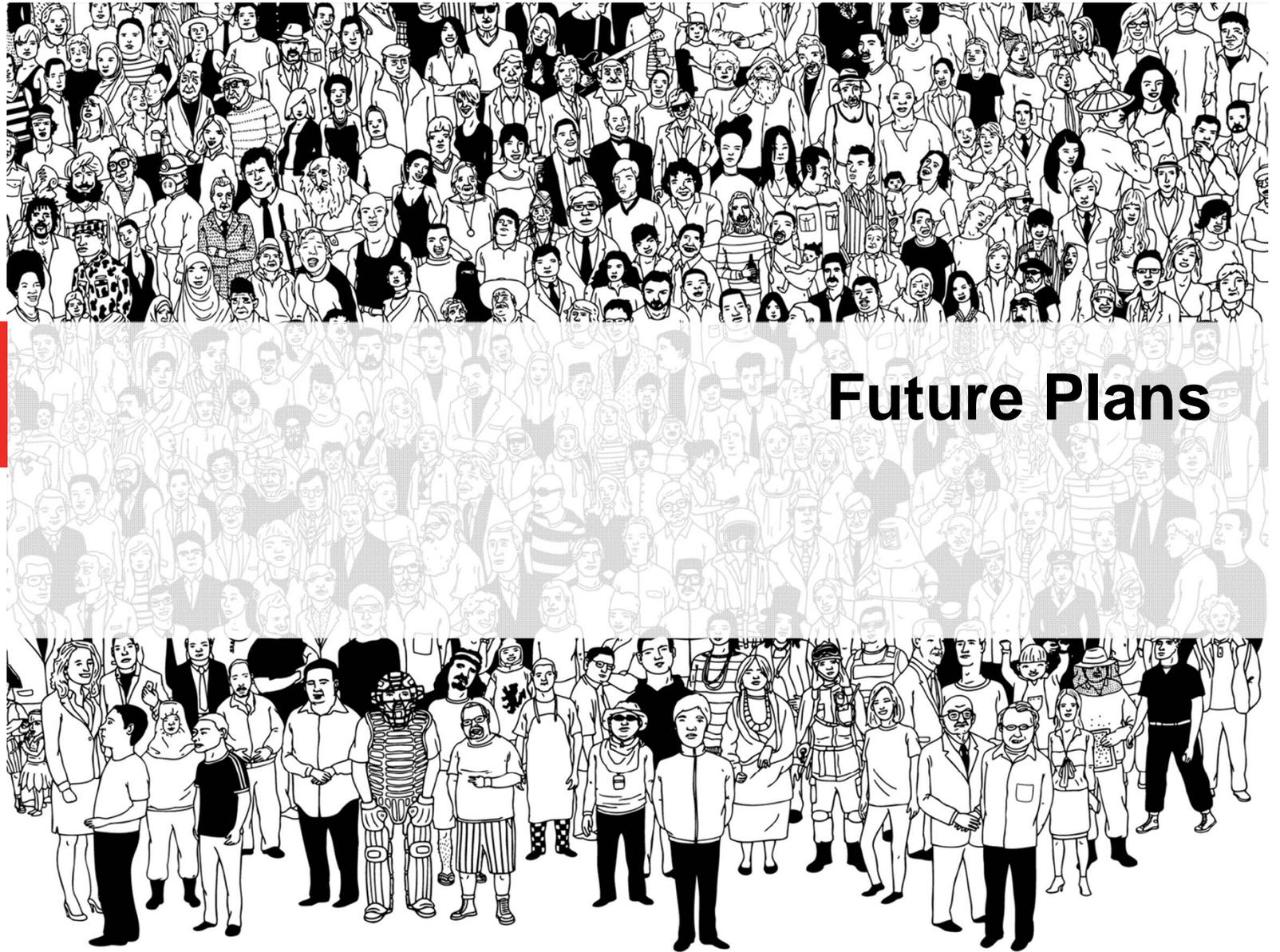
Who Buys SixthSense Reports?

- **'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

Omnibus

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

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

48hr service

2,000 RESPONDENTS RESULTS IN 48hrs

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

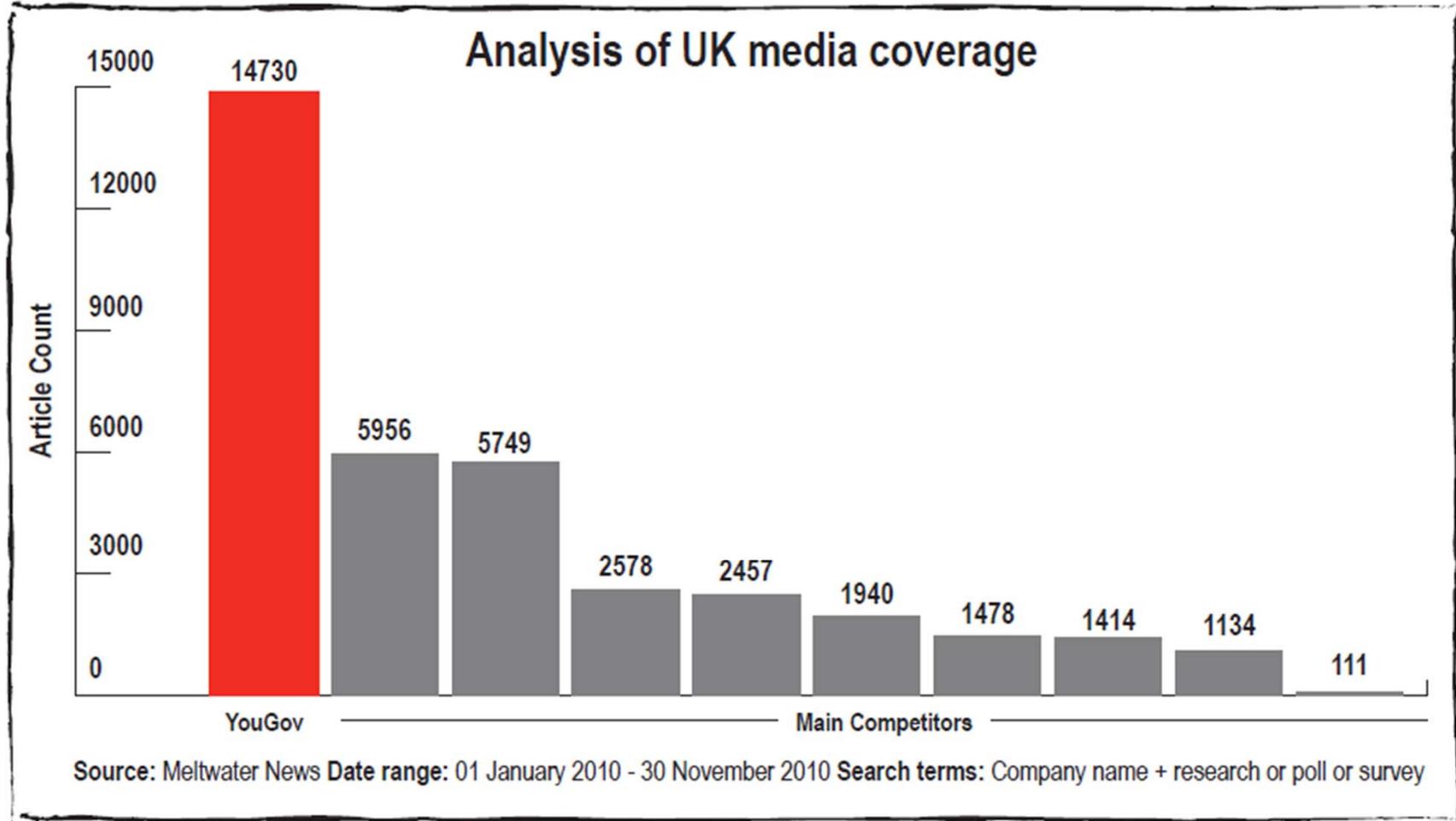


Product detail

- 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

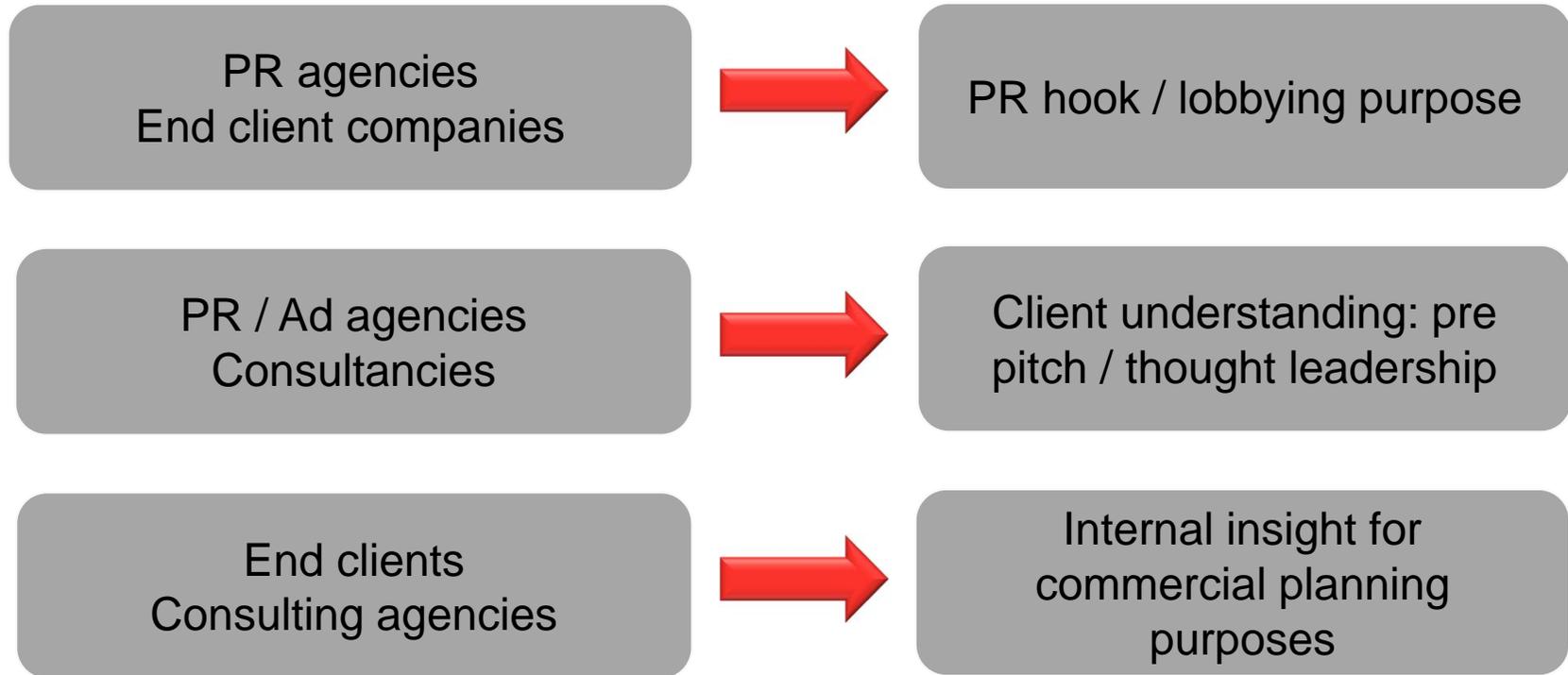
- 500 small business decision makers
- Weekly, results in 72hrs
- Entry fee £400, £650 per standard question

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





Survey finds opposition to privatisation of forests

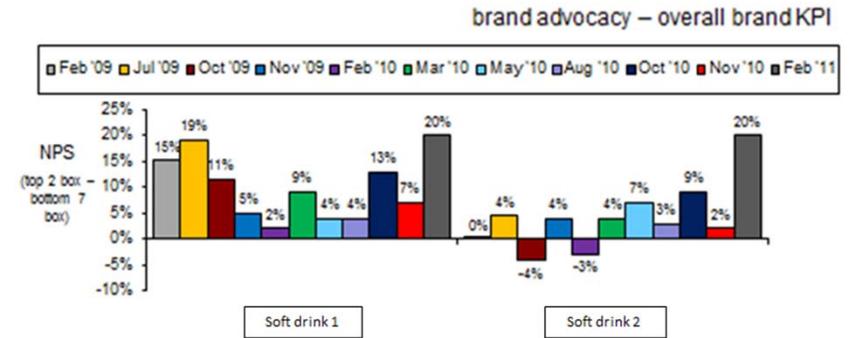
A majority of the public opposes plans to sell some of England's forests, a survey suggests.

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.

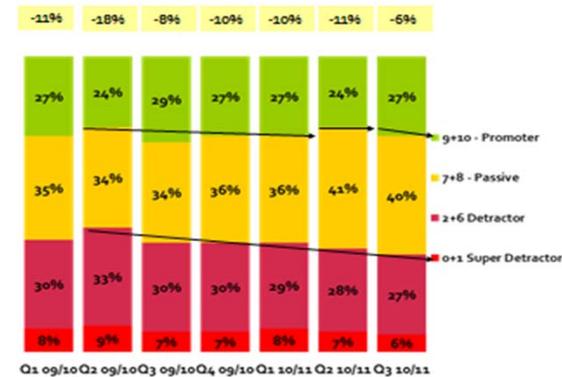


The Forestry Commission has 150,000 hectares of land in England



Question: 'Faster, how likely would you be to recommend brand's products to someone else?'
 Source: YouGov brand & comms tracker Base: Feb '11 - all chilled full 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)

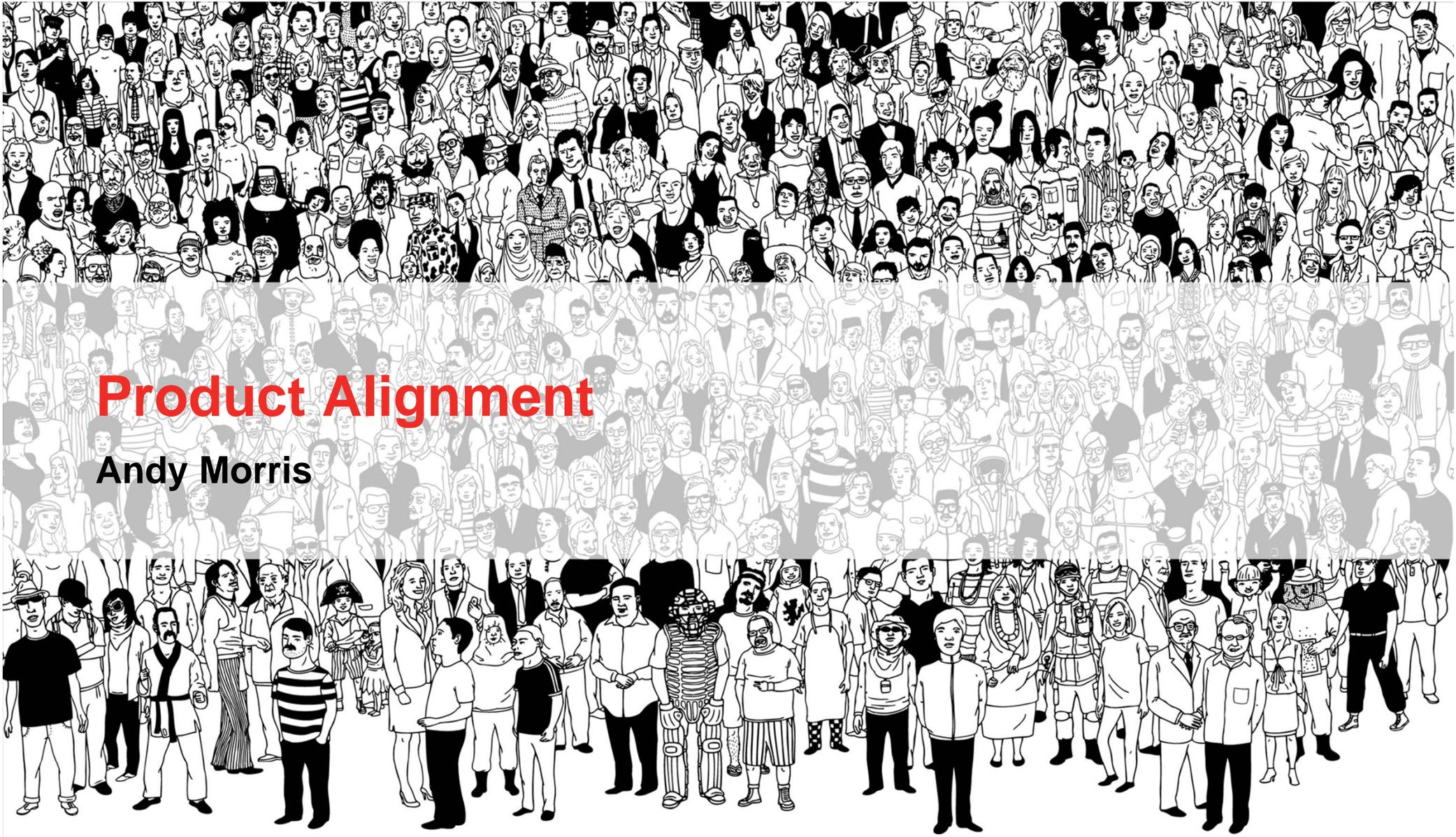


The current Tech & Telco syndicated products

- **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)

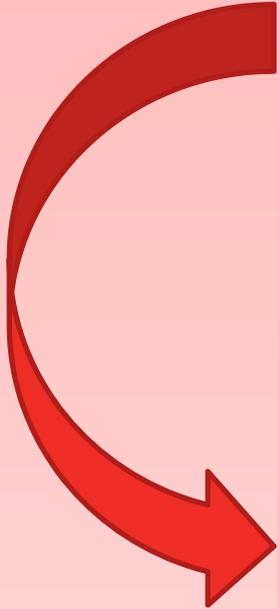
Regional Omnibuses (UK)

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)



The Future

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, FOST, 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



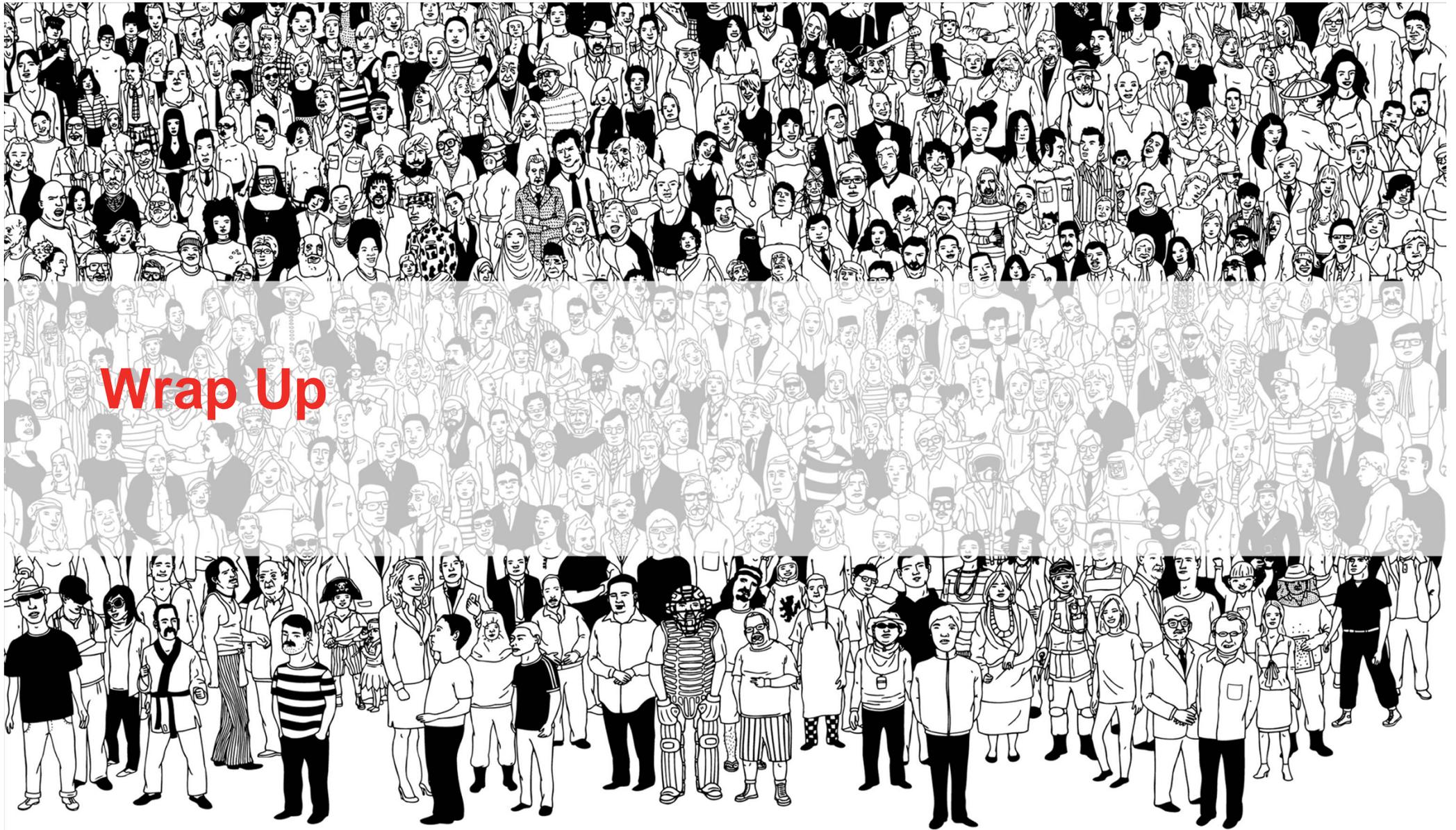
Household Economic Activity Tracker (HEAT)

- 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

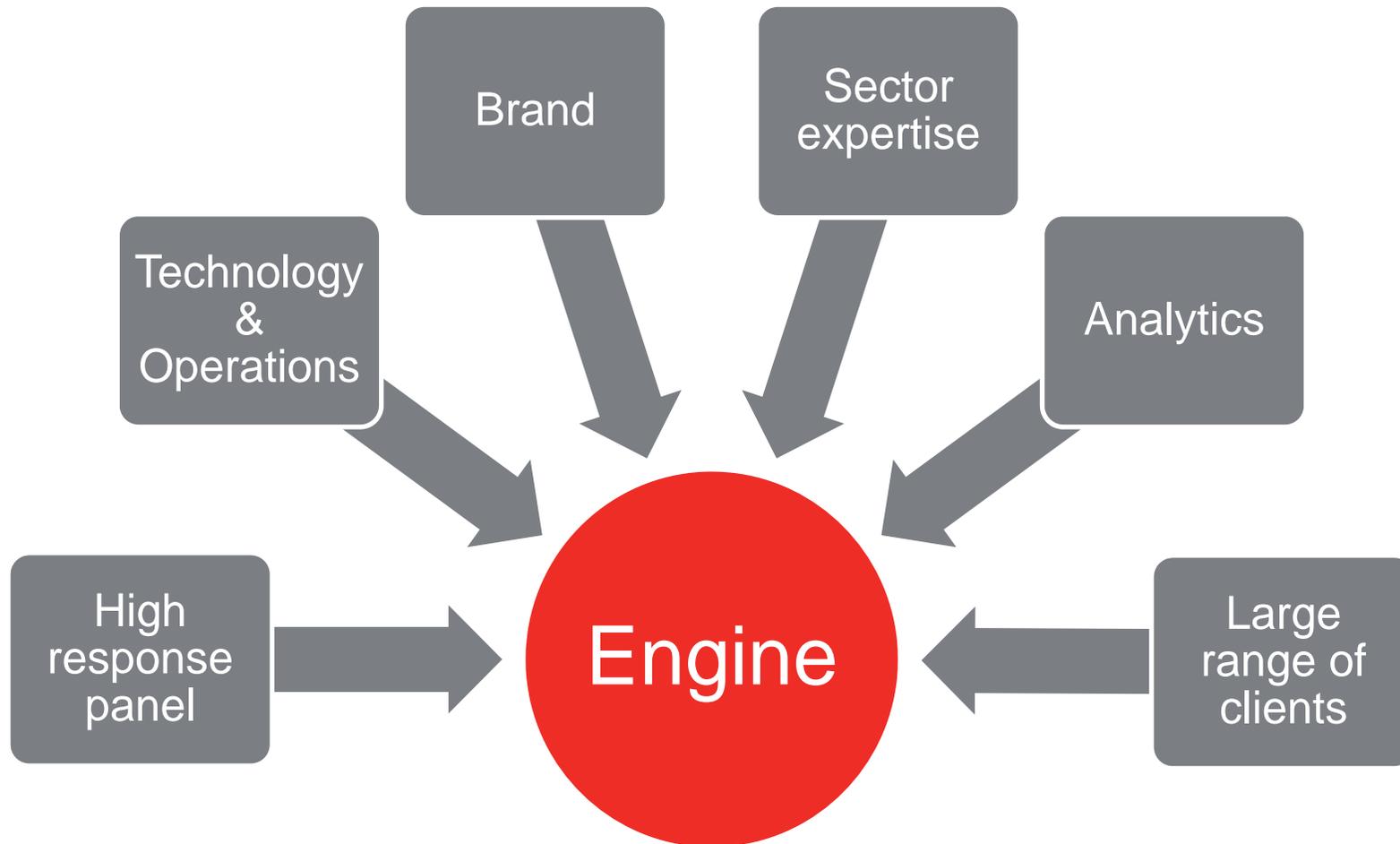


Housing Optimism Tracker (HOT)

- 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



Multi-platform product range

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