



Client Public Release Policy

Our Policy on Clients Releasing or Using Polling Research in the Public Domain

To protect both our and our clients' reputation, Ipsos Public Affairs has a rigorous protocol that applies to any survey whose results are released to the media or other stakeholders such as business partners, or used in client advertising and collateral materials. Our client public release policy stipulates that:

- Ipsos Public Affairs must review and approve all questions, sample frame and proposed methodology prior to data collection to make sure there is no bias or any current potential client conflict.
- After the data is collected, Ipsos then produces a summary of the findings in what is called a "Factum," which is a simple, clear and accurate description of the findings and methodology and comprises the official Ipsos "Findings of Record." The factum is delivered before or simultaneously with the data tables and will be posted on our website once the client's media release has been issued.
- Clients must submit their own media release, advertisement and/or use of any collateral materials featuring any data based on survey research conducted by Ipsos for review and approval. This helps ensure that the factual elements of the materials are accurate, the context is not misleading or in error, and the data released is not selective such that the overall findings of the study are misrepresented or are capable of being misconstrued. Clients should schedule 24 to 48 hours to allow Ipsos to review and approve their materials.
- Ipsos does not authorize its clients to release or use the results of any custom, syndicated or other polling/research undertaking that refers to any brand or corporate trademark other than their own, such as making comparative claims versus named or unnamed competitors (individual or aggregate) unless this has been approved by Ipsos in advance of the commissioning of said research. If approved, clients must agree to any methodological requirements and legal conditions in a signed statement of work.

Ipsos and the Ipsos group of companies are market and public opinion research industry leaders. Our clients sponsor public opinion or market research that is released to the media, to other stakeholders such as governments, or used in client advertising and collateral materials. Because our name is associated with the results, Ipsos regards the process of the release of this information as a partnership, not solely client driven, and one which is to be managed carefully.

Over the past two decades, we have built our brand to mean accuracy, truth, and insight. When we partner with a client for a public release of polling we have rigorous standards and a protocol that must be met because in the event there is a problem associated with the data or the spin, it can negatively affect our reputation and brand.



First, we check all questions before the research is undertaken to make sure there is no bias or a current potential client conflict; then, after we collect the data we produce our own analysis of the findings in what is called a “Factum” (examples are found on our web site at <http://www.ipsos-na.com/news-polls/>). Only then do we forward the Factum and the data tables to the client; and after we check and approve the client media release, advertisement or materials for accuracy and agree on a release date and spokesperson, we then post the Factum to our web site, along with all of the questions asked and detailed tables.

In the client media release, there is a brief methodology section that must be included with a “pointer” to the Factum on our website. This completes the circle and ensures that there is full disclosure including the name of the sponsor, methodology and findings. This also ensures the integrity of the work and protects everyone’s reputation. And all of this is managed with the Public Affairs Division of Ipsos that has the final say over all aspects of the release of information.

In short, if our name is on it with a client, the process and the findings of a publicly released poll must be beyond reproach.

We also charge a release fee of \$2,500 to \$5,000 for the rigorous public release process and write-up beyond the base research project price. Clearly, the total project price is determined at the outset of the undertaking so no one is surprised at the end.

The Process

If you want to conduct a poll with Ipsos or any of its companies and release it to the media or use the results for an advertisement or marketing support campaign, the rules are always the same.

First, we have a protocol and it is critical that you understand the policy *before* you do the research. Only on rare occasions does “after the fact” research get released.

We have a set of internal rules and check-offs to make sure there is no client conflict and that the research is conducted properly.

Second, you will either work through your research contact at Ipsos or directly with the Public Affairs Division that manages and approves all public release of information at Ipsos. The Public Affairs Division *must* review and approve the questionnaire and determine what fee is to be charged for the Factum and release process on top of the cost of conducting the research to cover the time taken for writing the Factum and carrying out the due diligence that is necessary. Remember, the Public Affairs Division must approve the questionnaire before it is undertaken. If this does not occur, and you end up with work to be released *after the fact*, it may not be allowed. Due to potential client conflicts we must follow the process.

Third, the research is then undertaken (Omnibus or Custom) and when the data tables come back *they are not sent to the client until the Factum is completed*. Adequate write-up time must be ensured—in some cases this can take a week or more. At the end of the process, every client, regardless of circumstance, must have a fully written Factum



that is posted on our website—a power point deck or other materials are no substitute. When the Factum is completed and approved it is sent with the data tables to the client. The client writes their own media release or advertisement or collateral materials and it is then submitted back to the Public Affairs Division that reviews it and signs off on it when the wording and facts are deemed appropriate. There must be at least a full working day scheduled for this to take place. Review and preapproval of the client text is necessary to ensure that the factual elements of the release are accurate, the context is not misleading or in error, and the data released is not selective such that the overall findings of the study are misrepresented or are capable of being misconstrued. The Public Affairs Division has the final say on all client uses of our polling numbers.

Finally, we agree to a release date and how it is to be distributed. We do not provide public or media relations services to our clients. We simply do the research, check the facts, post the results and speak to the results if required.

Each Factum must include the following:

- Name of the sponsoring client
- Name of the designated spokesperson for Ipsos
- Sample size
- Dates that the study was conducted
- Margin of error
- Precise questions asked
- Detailed tables

Each client media release should include at least a mention of the date the poll was conducted, sample size with margin of error and methodology with a designated link or pointer to the Ipsos website where the Factum and detailed tables are located.

We should always be attentive to the “freshness” of a public release: any release of polling more than 60 days after being conducted is certainly not “new”. We should always work towards releases within this window—anything after may be problematic or not possible.

Finally...

The use of the name Ipsos or a related Ipsos company in a client’s release of information publicly is not permitted without the prior agreement of Ipsos.

The Ipsos name carries prestige and goodwill. A client’s entitlement to use the Ipsos name, or that of a related company, and the manner in which the name may be used, should be stated in the client’s contract or undertaking with and by your research contact.

Where a client has not complied with this release of information policy, Ipsos and its related companies reserve the right to comment publicly in response to the client’s release of said information to correct the record.



Ipsos Public Affairs

The Social Research and Corporate Reputation Specialists

Further, Ipsos is entitled to preserve its goodwill. The release of inaccurate or misinformation to the public could damage Ipsos' reputation. Ipsos may also take such legal action, as it deems appropriate in these circumstances.

Syndicated studies produced by Ipsos are not for dissemination to the public. These studies are proprietary to Ipsos and are subject to copyright laws. Dissemination of any information from syndicated studies, without the prior written consent of Ipsos is prohibited.

If you have any questions about the media release procedure, please call the contact in your region:

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