



Tuesday 6 June 2017

# Investor day 2017

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**GAME CHANGERS**



# Agenda

09:20	Didier Truchot	<i>Ipsos Chairman &amp; CEO</i>	Total Understanding
09:40	Laurence Stoclet	<i>Ipsos Deputy CEO &amp; CFO</i>	Financial Perspectives
09:50	Judith Passingham	<i>CEO Ipsos Interactive Services / Operations</i>	Total Access
10:05	Shane Farrell	<i>CEO EMEA</i>	Total Coverage
10:20	Henri Wallard	<i>Ipsos Deputy CEO</i>	Total Science and Knowledge
10:35	Coffee		Ipsos Knowledge Center Booth
10:50	Arnaud Caré	<i>Ipsos Connect France</i>	Understanding Consumers at Ipsos Connect & Ipsos Marketing
	Léa Turquier	<i>Ipsos Marketing France</i>	Pernod Ricard
	Alex Grönberger	<i>CEO Latin America</i>	Uber
	Liz Landy	<i>Managing Director, Ipsos Connect UK</i>	BBC
11:25	Pierre Le Manh	<i>Chairman &amp; CEO, NA &amp; Ipsos Marketing</i>	Understanding Patients at Ipsos Healthcare
11:40	Ben Page	<i>CEO UK &amp; Ireland</i>	Understanding Citizens at Ipsos Public Affairs
	Brice Teinturier	<i>Deputy CEO, Ipsos in France</i>	UK elections
			French elections
12:00	Q&A		
12:30	Lunch Buffet		Ipsos Knowledge Center Booth



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# Total Understanding

Didier Truchot  
Ipsos Chairman & CEO

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GAME CHANGERS



# The world of Today beyond a slower rate of growth<sup>(\*)</sup>

- Globalisation
- Fragmentation
- Digitalisation & Socialisation
- Innovation through technologies and heavy marketing & sales spendings
- Increased competition and volatility

**(\*) in comparison to the beginning of the century**



# The information market is growing

- Our clients work through Data Driven Decision processes
- This is true for any company and institution
  - Old and new
  - In any sector and any market
- So they want to Collect, Store, Analyse, Master  
Many different sources of information
- The main question has changed
  - In the old days: how can I get the information I need?
  - Today: how can I analyse and understand the information I have?
  - Tomorrow: how can I build a framework and capital of trusted insights?

# The information market attracts more competition

- Competitors
  - Technology companies
  - Specialised new players, technology-driven for many of them
  - DIY solutions
  - Marketing services companies
  - Consulting firms
- Ipsos had to move and launched the New Way programme mid-2014

# Continue to leverage Ipsos' assets

- Its knowledge
  - Consumers across sectors
  - Broader knowledge of the world and the social and political environment
  - Global presence (200 cities) and knowledge of countries and cultures
- Its teams: their talent, expertise and know-how
  - Data scientists
  - Sociologists
  - Technologists
  - Researchers
- Client relationships
- Operational capabilities and complex project management skills
  - Multi-channels
  - Integrating various technologies
- Independence and neutrality

# Keep its promise to its clients: 4S's



The business of Ipsos consists in delivering reliable, relevant and actionable information

# Start the transformation of the offer

## OBJECTIVES

Measure differently

Have the data in real time

Integrate big data

Offer expert advisory services

## NEW SERVICES

- Web listening
- Communities
- Behavioural economics
- Ethnography
- Neurosciences
- Consumer and Retail Audit
- Mediacell/passive measurement
- Mobile
- Overnight Services
- Enterprise Feedback Management (EFM)
- Data analytics / Data Science
- Ipsos Science Center
- Path to Purchase
- Market Entry Research
- Workshops
- Advisory services
- Insight Cloud

*New Services organic growth – Q1 2017*



*New Services share of revenue – Q1 2017*



# The New Services

Need to move

- From the perimeter to the core
- From the additional upstream to the mainstream

Ipsos is preparing a new plan

- For 2018-2020
- Its Name: « Total Understanding »

2018-2020 PLAN

# Total Understanding

- Master all sources of information
- Master all relevant technologies
- Develop all necessary know-how

To produce and analyse any information about Society, markets and people

And help our clients to act and evaluate.

TOTAL UNDERSTANDING


# Through some 20 Service Lines

Existing ones

- Brand Health Monitoring
- Media Audience Measurement
- Consumer Journey
- Product Testing
- EFM
- Social Research
- Political Polling
- .....

And some new ones

- Social Intelligence & Analytics
- Immersion
- Multi-Touchpoint Attribution



They will be deployed  
separately  
and together



TOTAL UNDERSTANDING

# A promise that Ipsos can make thanks to:

- Its size and coverage
- Its reputation
- Its experience
- Its competencies (data science, behavioural science, ethnography, neuroscience, advisory, mobile & digital fieldwork,...)



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# Financial perspectives

Laurence Stoclet  
Ipsos Deputy CEO & CFO

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GAME CHANGERS



# The extended market

The extended market is large and fragmented

## According to ESOMAR (in billion USD)

**2015**

Traditional Research 39.7

“New” Research 28.2

**Extended market 67.9**

## Top 10 companies

- Revenues: \$21.3bn
- Share: 31%

# A new market segmentation

MEASUREMENT

New

UNDERSTANDING

Old: "Panel" or "Syndicated"

Retail audit  
Consumer panels  
Media audience

Nielsen, Ims Heath, Gartner,  
Iri, Dunhumby, Gfk, Intage

1/3

Big  
Data

CRM/C  
X

Social

Digital

Old: "Custom/Ad Hoc" or "Consumer Insights"

Survey  
Qualitative  
Behavioural science  
Advisory services

Kantar (Wpp), Ipsos, GfK,  
Westat

2/3

2018 - 2020

# A growth plan

## Organic growth

- Between 2% and 5%

## Targeted acquisitions

## Growing the share of New Services

- From 12% to around 20%

## Good generation of Free Cash Flows

BEYOND 2020

# Within 7 to 10 years

## Ambition

- Become the reference beacon in the Understanding segment by reasserting and strengthening Ipsos unique positioning

## Financial objectives

- Double the size of the company and  
Increase its share in its addressable market (around 5% today)
- Around 15% operating margin thanks to
  - Weight of New Services
  - Pricing power
  - Digitisation of fieldwork (90%)
  - Scale

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# Total Access

Judith Passingham

Global CEO, Ipsos Interactive Services / Ipsos Operations

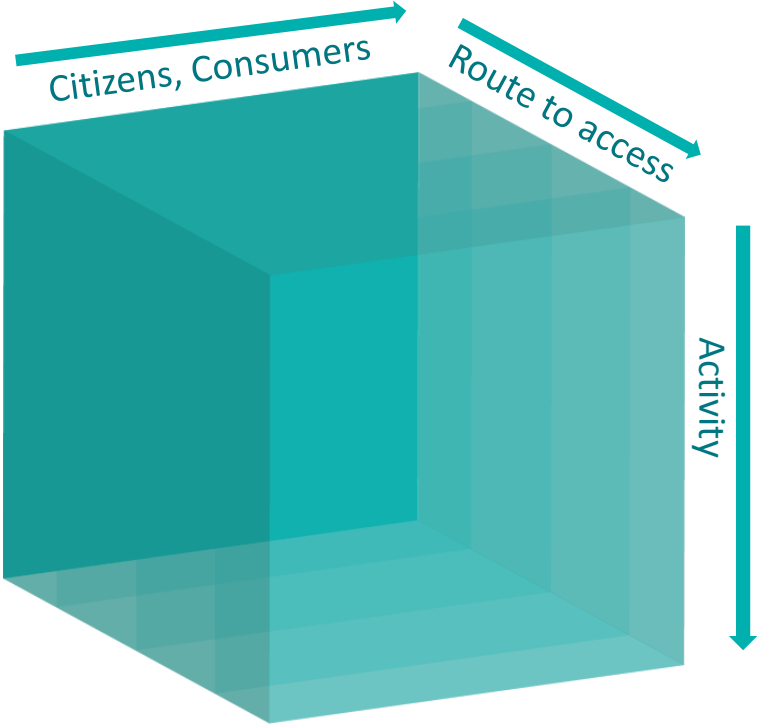
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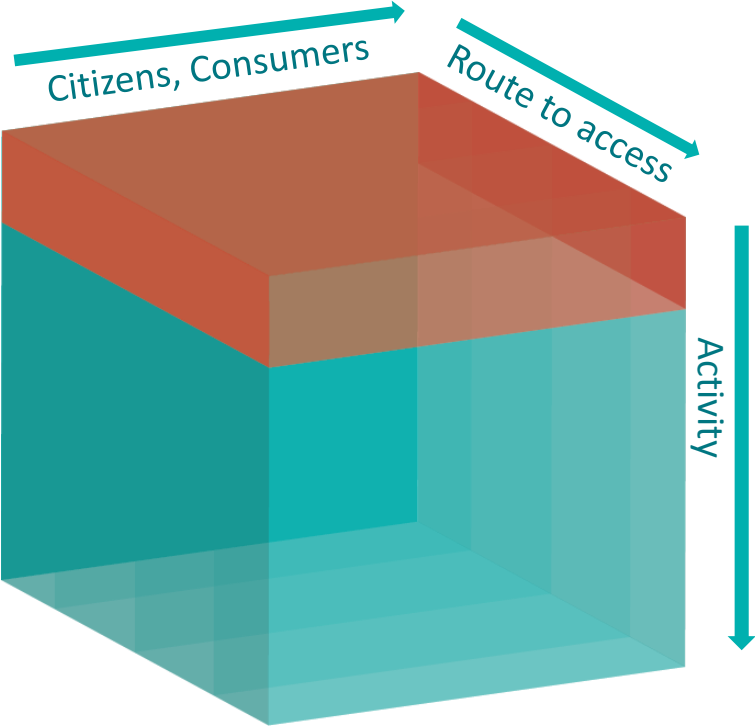
**GAME CHANGERS**



# TOTAL ACCESS

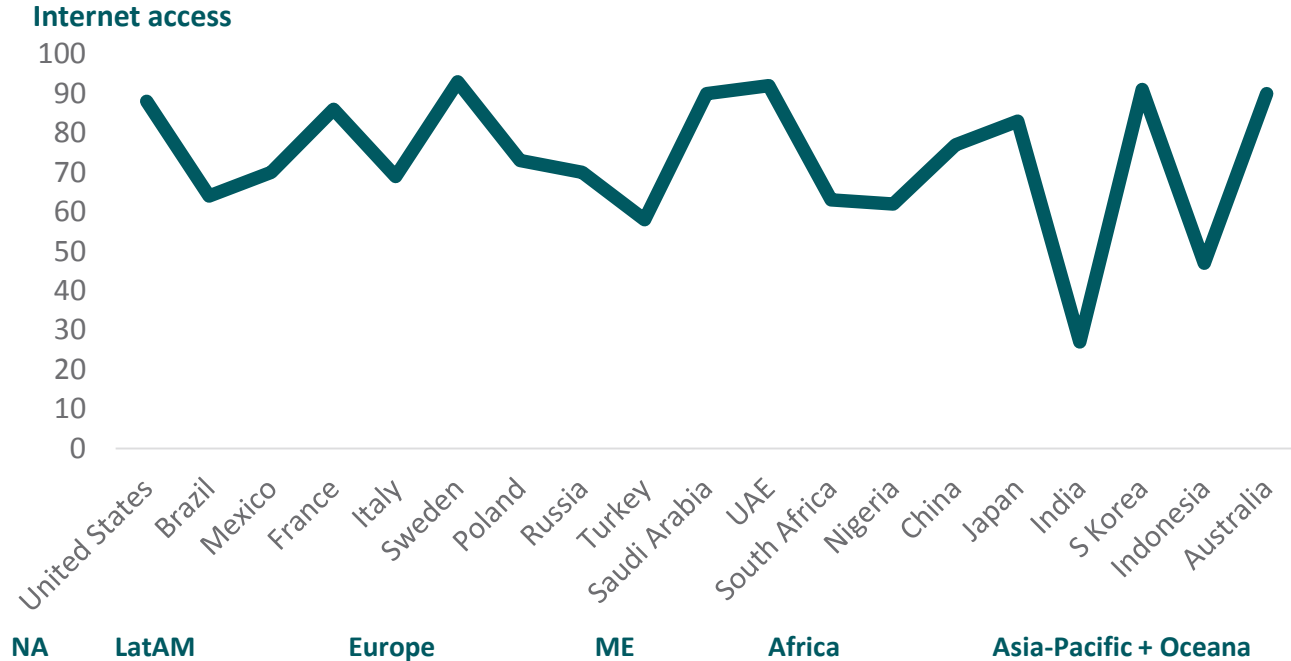


# TOTAL ACCESS

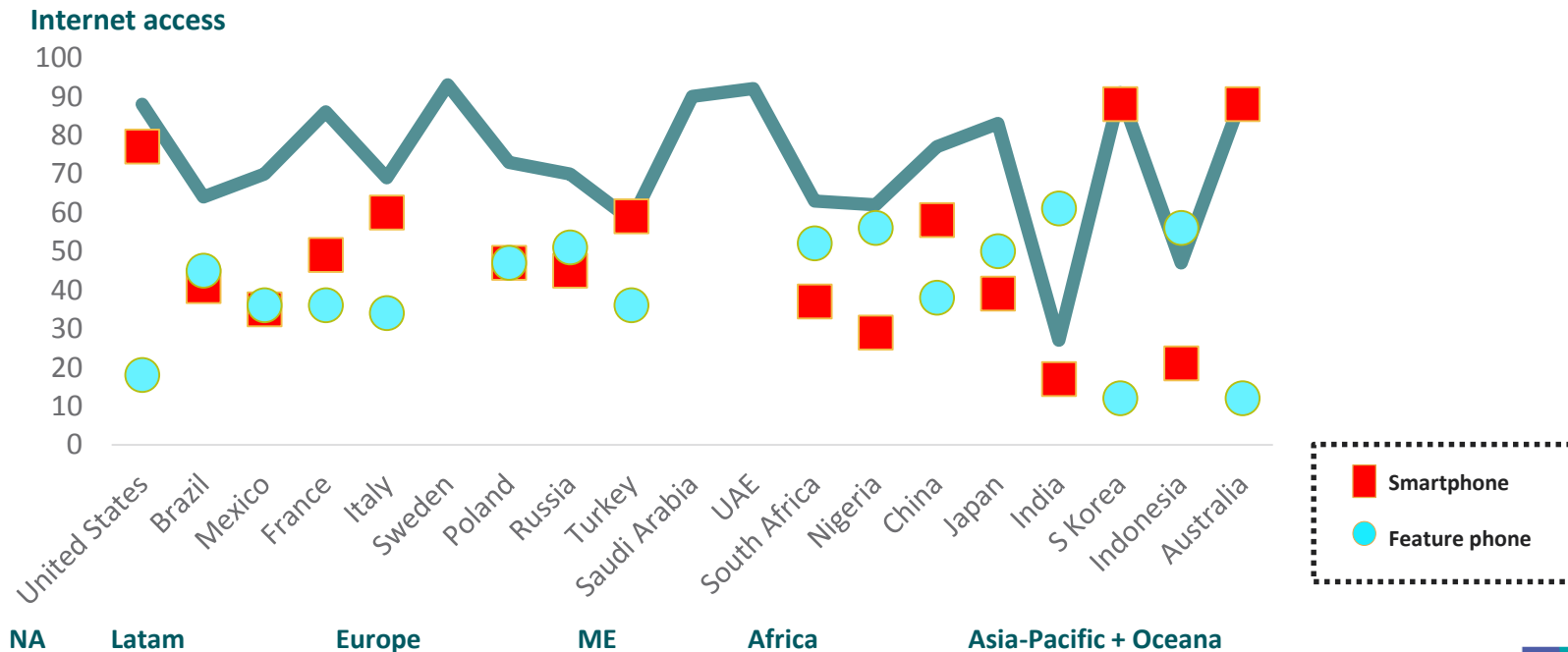


TOTAL ACCESS

# Material differences between key populations

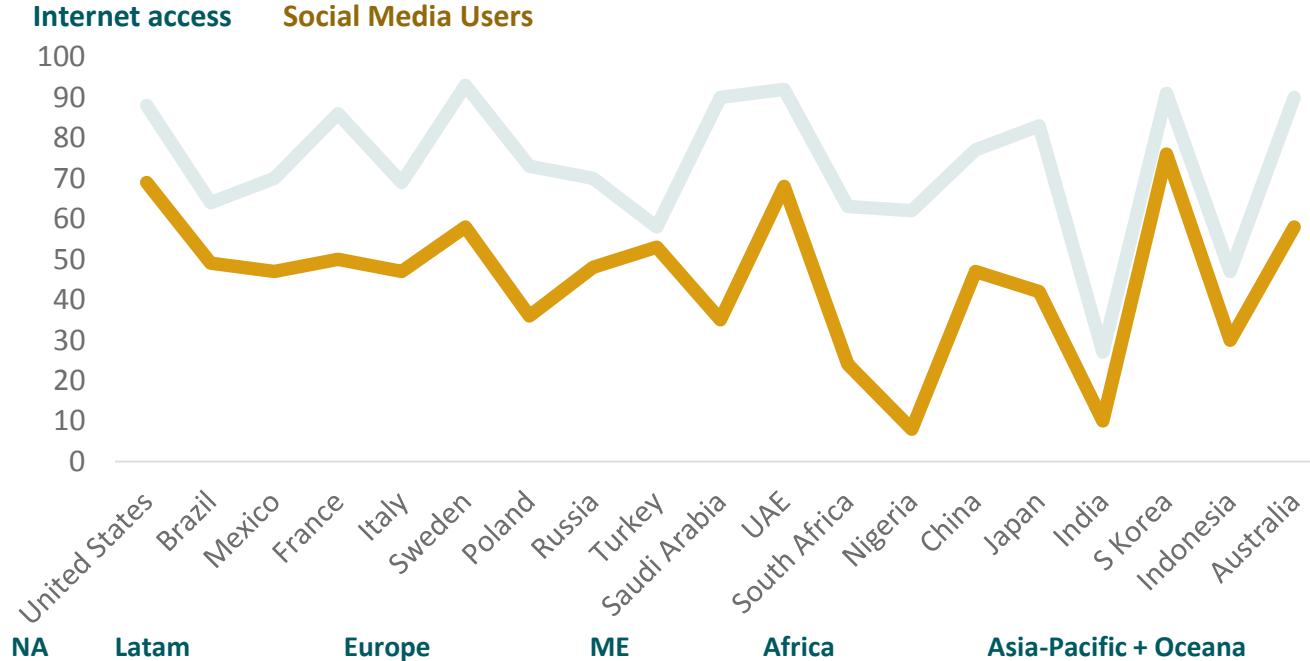


# Material differences between key populations



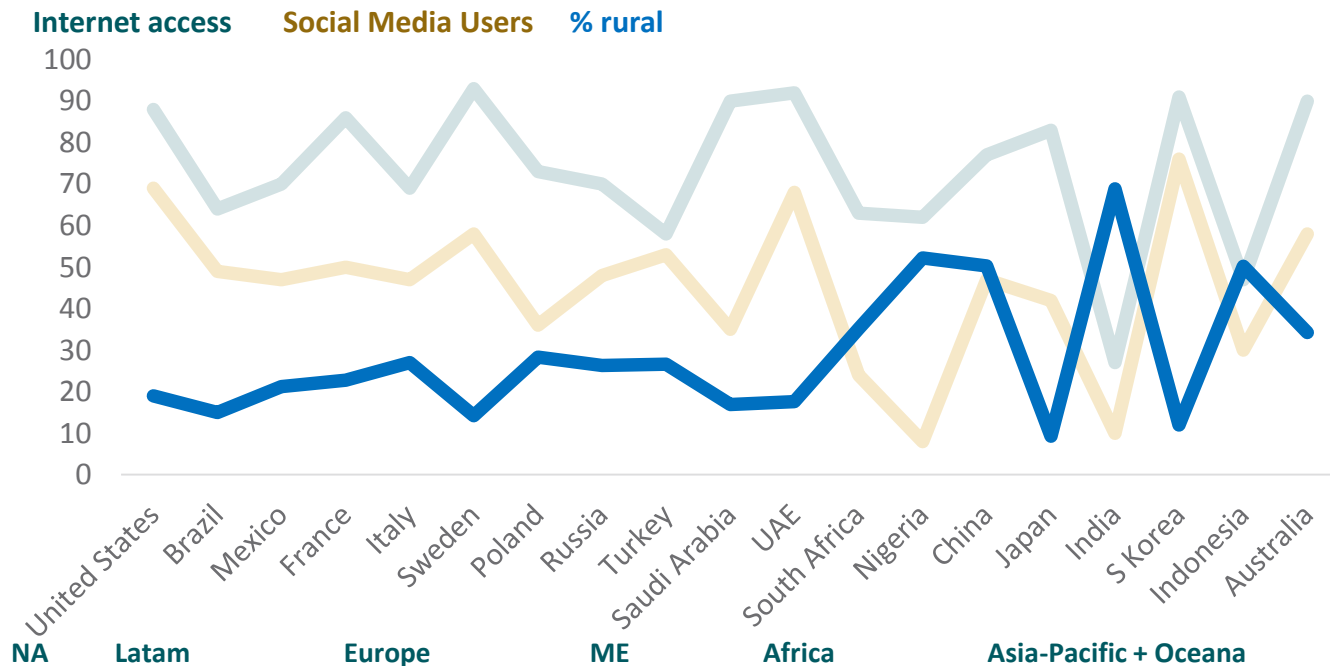
TOTAL ACCESS

# Material differences between key populations



TOTAL ACCESS

# Material differences between key populations



TOTAL ACCESS

# Doesn't simply mean country/regional difference



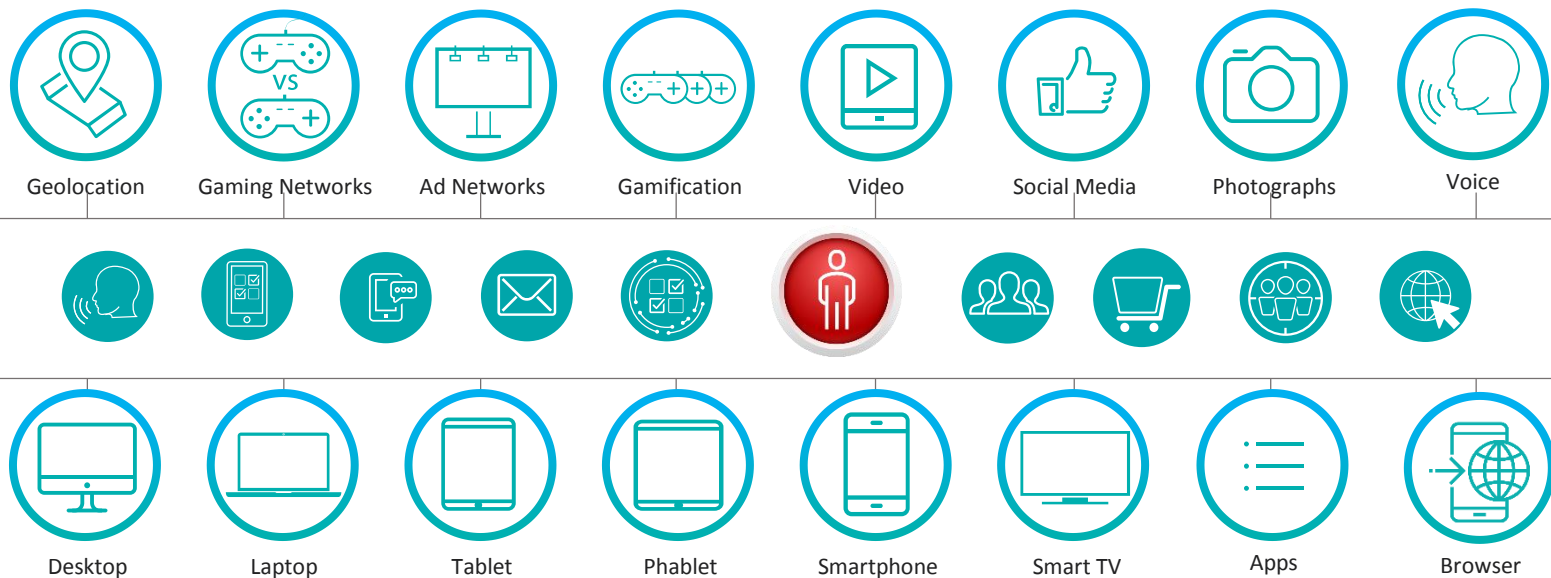


TOTAL ACCESS

# It means the way you communicate/exchange



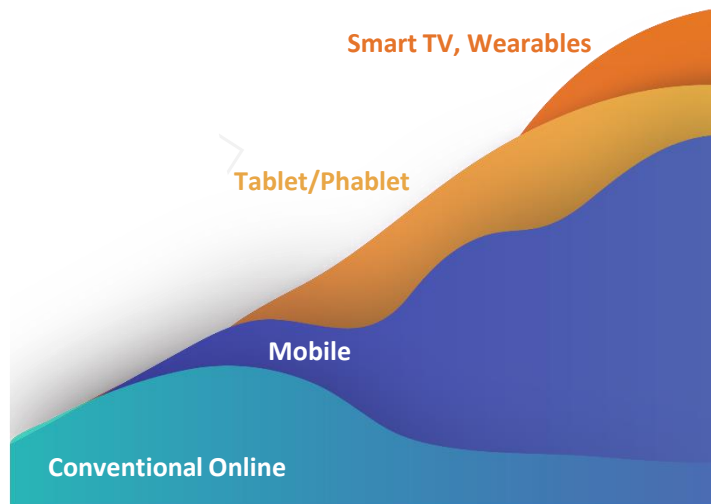
# It means both access to technology & the type of information we need to collect



TOTAL ACCESS

# Converting previous assets to exploit new research opportunities

## — MOBILE



Employee  
Feedback



Qualitative



Instant Brand  
Health



Healthcare



Ideas Testing



Campaign  
Sponsorship  
Effectiveness



Shopper



Customer  
Experience



Retail



Diaries &  
Ethnography



Product  
Testing



Media  
Consumption



Concept  
Testing

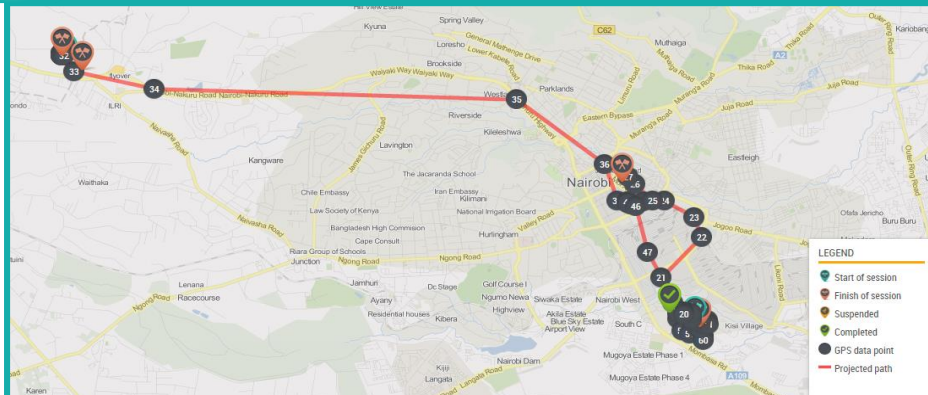


Population  
Movement

TOTAL ACCESS

# Converting previous assets to exploit new research opportunities

## — DIGITAL FIELD



## NEW TYPES OF DATA



Voice



Video

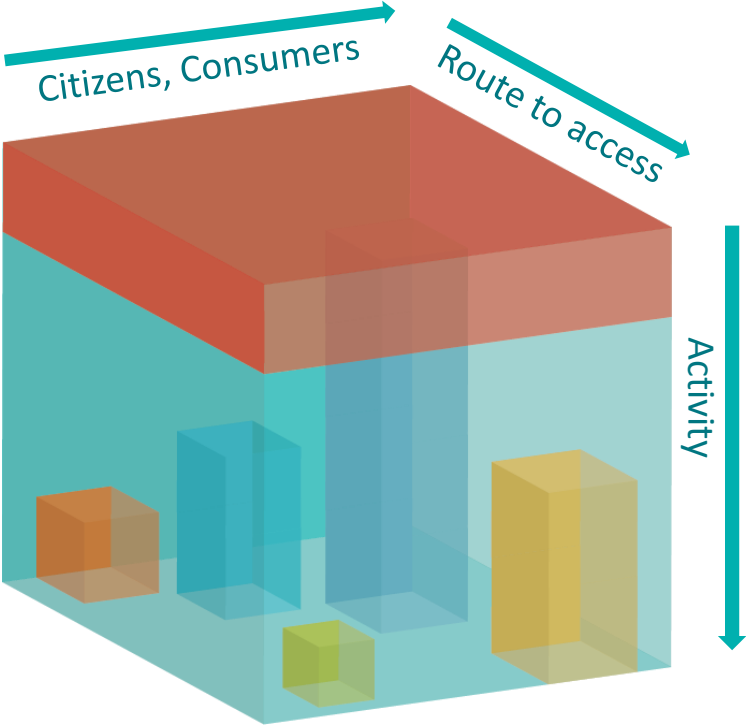


Photo

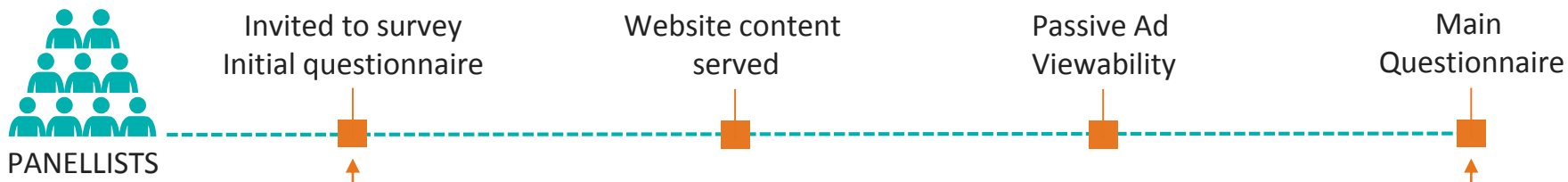


Health

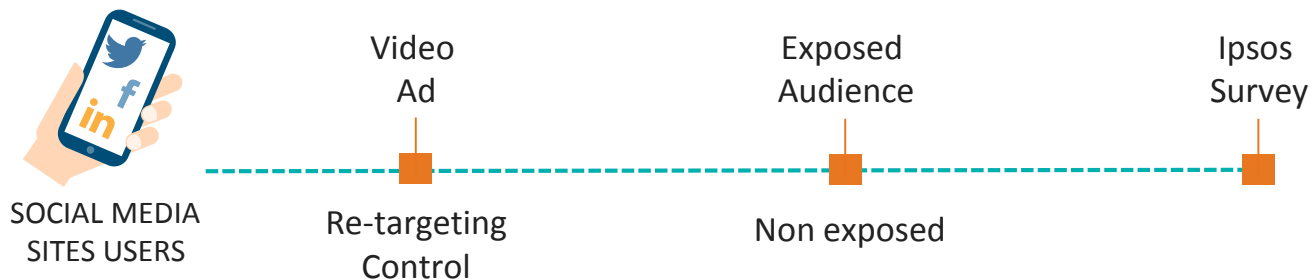
# TOTAL ACCESS



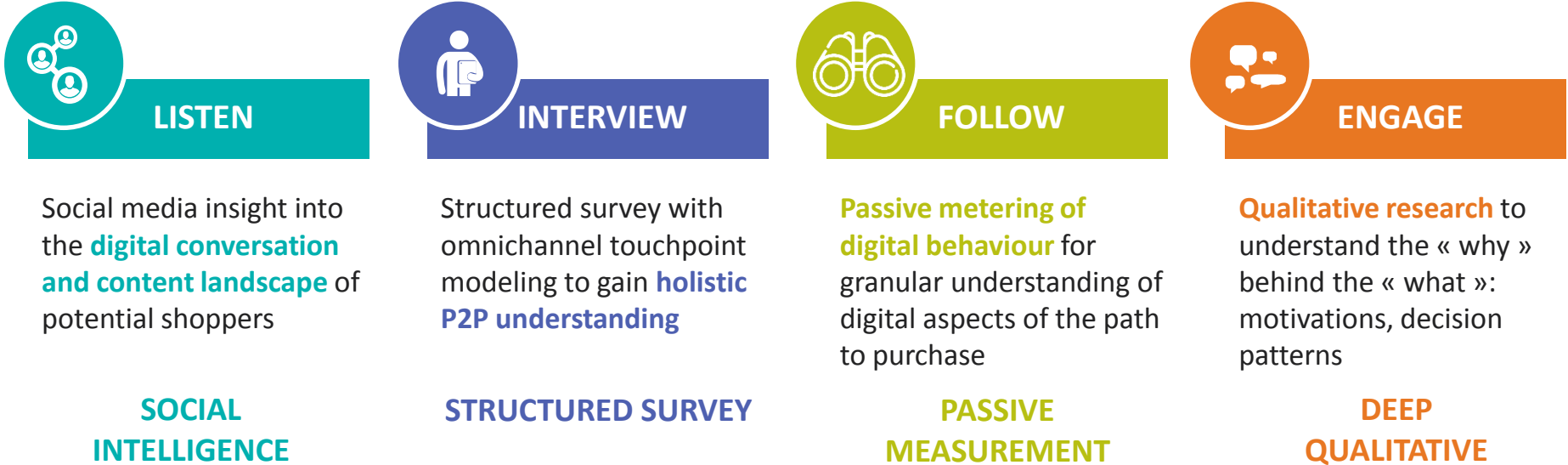
## CONNECT DIGITAL – LINKING SURVEYS TO PASSIVE



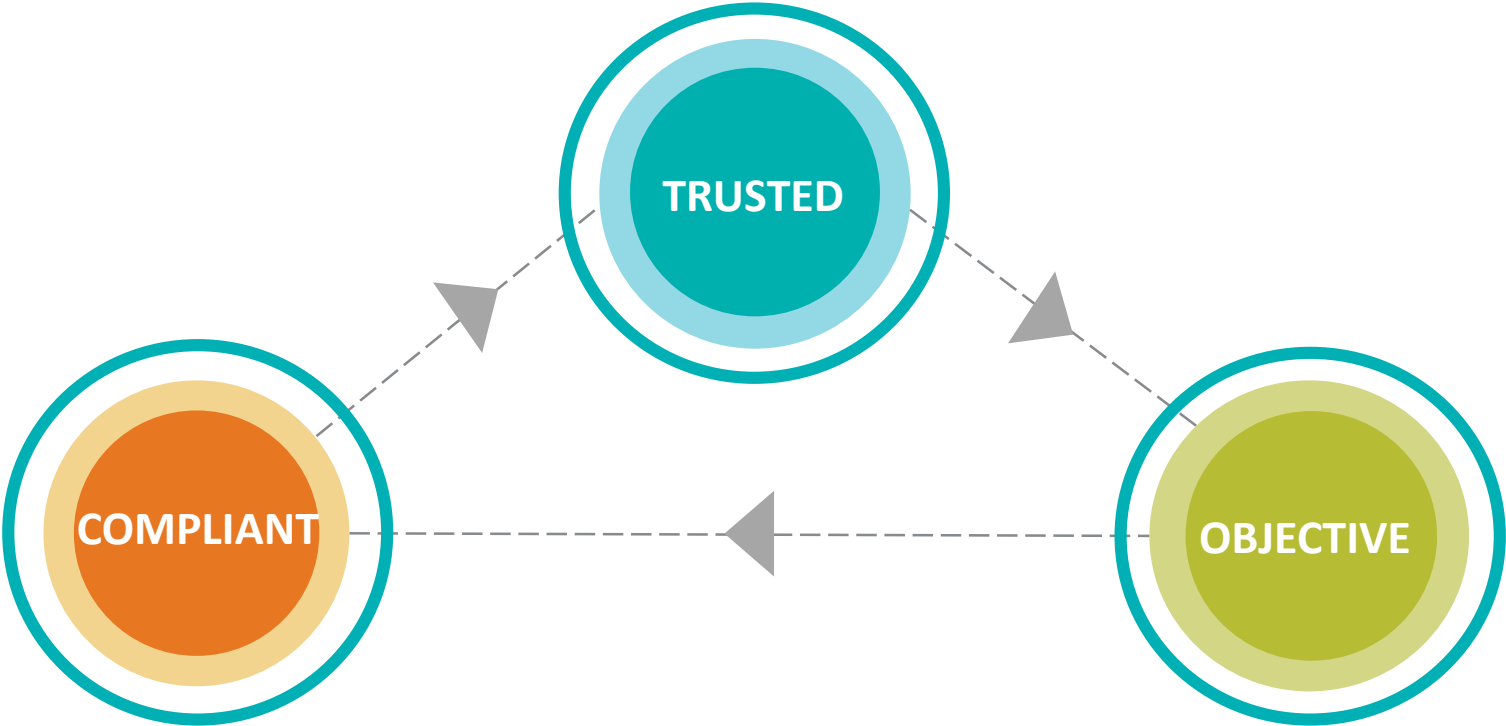
## CONNECT LIVE – LINKING TO SOCIAL MEDIA SITES



## PATH-TO-PURCHASE – LINKING ONLINE, OFFLINE & PASSIVE TECHNIQUES



TOTAL ACCESS





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# Total Coverage

Shane Farrell  
CEO EMEA

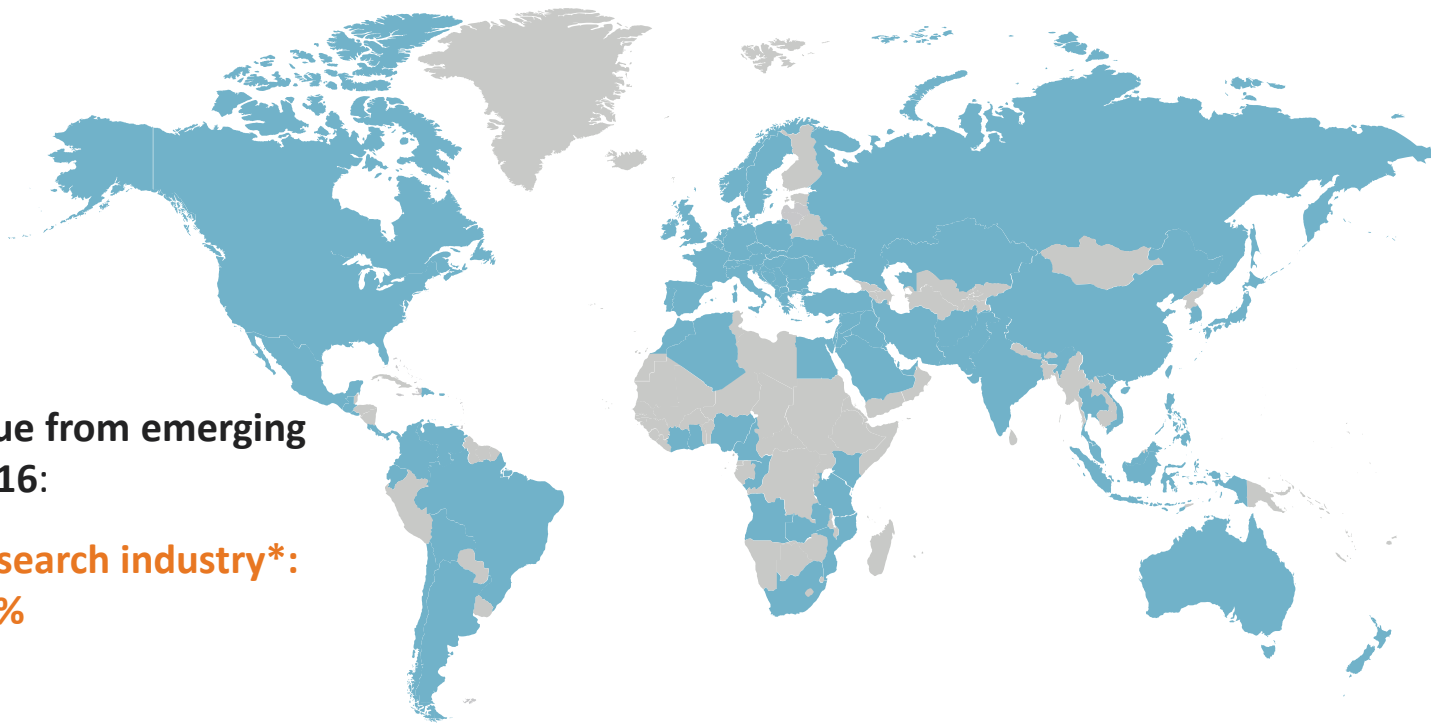
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**GAME CHANGERS**

TOTAL COVERAGE

# Ipsos is present in 88 countries worldwide









Share of revenue from emerging countries in 2016:

<b>Ipsos:</b>	<b>Research industry*:</b>
<b>32%</b>	<b>17%</b>






## TOTAL COVERAGE

# Sectors in 2016

### Main sectors:

	CPG 	TECHNOLOGIES, MEDIA & TELECOM 	PHARMACEUTICALS 	FINANCIAL SERVICES 	AUTOMOTIVE INDUSTRY 	PUBLIC SECTOR 
Share of revenue:	31%	16%	13%	8%	6%	6%
% change <sup>1</sup> :	1%	4%	5%	7%	1%	3%

### Others:

	RETAIL 	BUSINESS SERVICES 	TRAVEL & LEISURE 	OIL & GAS OPERATIONS 	MARKET RESEARCH 
Share of revenue:	3%	3%	2%	2%	2%
% change <sup>1</sup> :	0	5%	24%	-5%	-2%

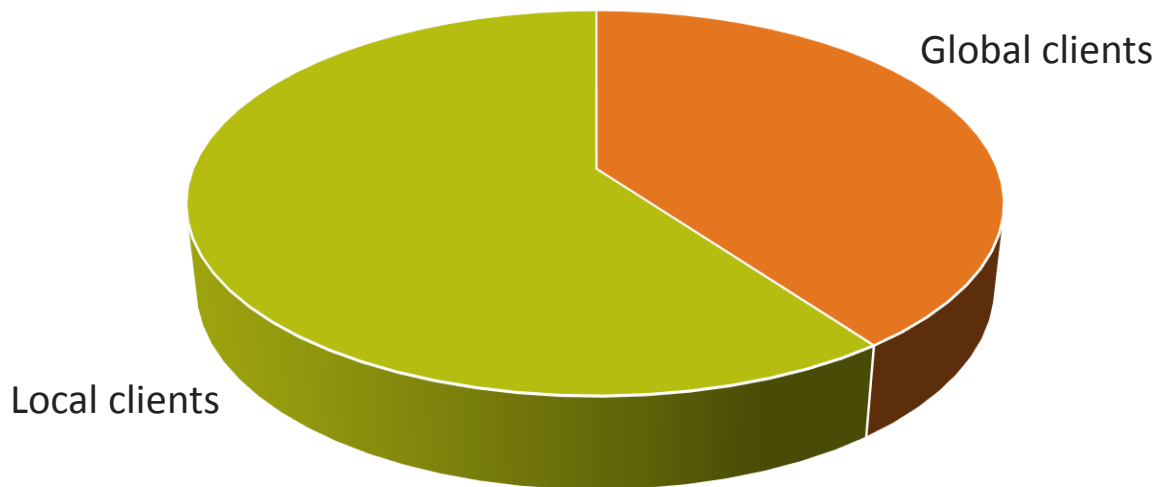
<sup>1</sup> vs 2015 at constant scope and exchange rate

TOTAL COVERAGE

# Local Clients in Central Eastern Europe in 2016

Revenue growth of  
local clients in 2016  
for Central Eastern  
Europe:

**+10.5%**



## TOTAL COVERAGE

# Strong growth from local clients?

### Local clients are a significant contributor to Ipsos growth

- Over half of our business in most regions
- Strong growth in the fastest growing regions
- CEE: over 11% revenue growth in 2016

### Key element of success with local clients: strong Ipsos teams in each market

- Global strategy applied by Ipsos teams allowing them to:
  - Work with these clients across the organisation
  - Benefit from knowledge sharing and strong local insights company-wide
- Russia: over 500 people working for Ipsos and the #2 player

### Key element of success with “€5-15 billion” turnover expanding companies: Ipsos’ on-the-ground capabilities coupled with New Services

- Through the application of such expertise-leveraging technology e.g. Tracking platform, Data collection (mobile...)
- Together with local market insight



ŠKODA



Rostelecom



TOTAL COVERAGE

# Telecom: Rostelecom

- Russia's leading long-distance telephony provider
- Leader of the broadband & pay-TV markets in Russia
- Over 12.5 million fixed-line broadband & 9.4 million pay-TV subscribers



## Ipsos in Russia conducts

- Ad-hoc consumer research (e.g., Journey Pathfinder)
- Brand Health
- Customer satisfaction programmes in B2C and B2B segments

# Insurance: Zurich Insurance Group

- Global insurance company
- 3 core business segments: General Insurance, Global Life and Farmers



## Scope of programme & client engagement

- More than 23,000 customers surveyed in 2016 across 20 markets (including retail and commercial customers)
- More than 5,000 distributors surveyed across 15 countries, covering key aspects of the relationship with Zurich
- Services to local in-country Zurich teams including feedback from customers.
- Used for prioritisation of improvement plans and decision support.
- Basis for development of various business cases (tool development, training, communication plans)
- Input for Board Meetings and group executive committee score card
- Provide key broker houses with an overview of customers feedback and Zurich action plans.



TOTAL COVERAGE

# Automotive: Skoda

ŠKODA



- Czech Automotive brand (part of the VW-Group)

## The two buckets:

- Mystery Shopping
- Ad hoc, tracking, staff and training sessions

We are constantly reaching new departments at Skoda and their stakeholders to cover as many fields as possible.

**Our goal is to be a complex provider**, starting with the product and ending with the sales network.

TOTAL COVERAGE

# Food & Beverage: Arla

- Dairy product leader in Scandinavia
- Owned by dairy farmers and based in Denmark



## Ipsos conducts the majority of quantitative innovation research:

- Concept testing
- Pack testing
- Other related projects, e.g. Usage & Attitudes.

# Total coverage for a stronger position

-  Ipsos strong presence in emerging markets, double that of the industry as a whole, **offers stronger growth opportunities** than would otherwise be available
-  **Ipsos clients are across numerous sectors**, with some in high growth sectors such as technology and new media, which open up greater growth opportunities
-  In addition to Global and Regional client bases, **expanding local clients** (in Telco., Insurance or CPG) in the €5-15 billion turnover range are a rapidly growing client segment
-  **Ipsos offering** of global expertise, New Services and strong local execution, opens up numerous opportunities in many emerging companies

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# Total Science and Knowledge

Henri Wallard  
Ipsos Deputy CEO

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# SCIENCE-EMPOWERED

# Market, Opinion and Social Research and Data Analytics

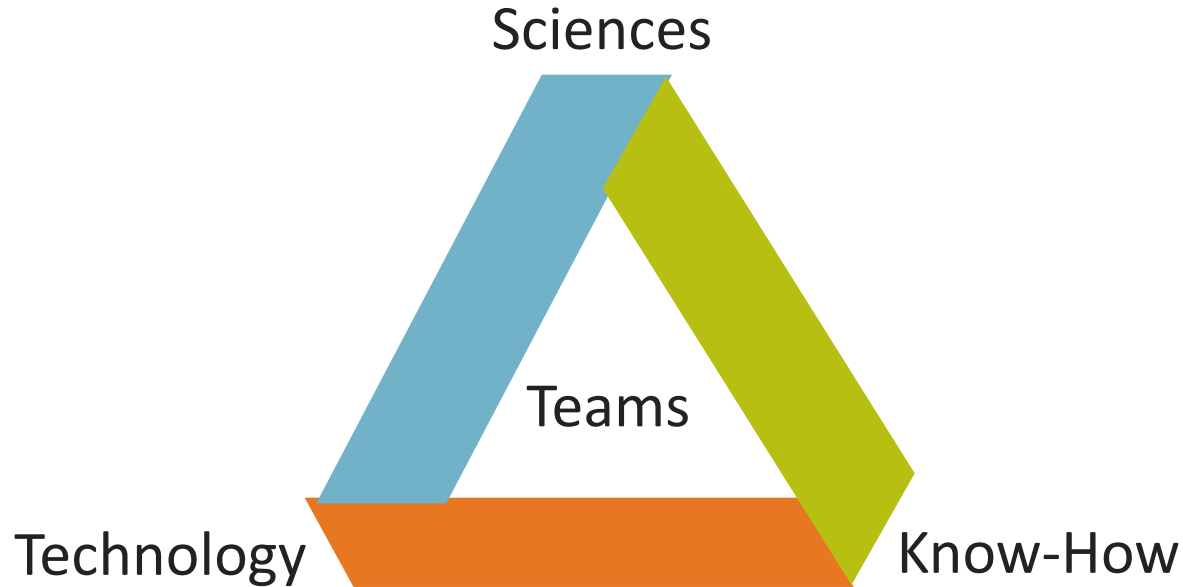
Research which includes all forms of market, opinion and social research and data analytics, is the systematic gathering and interpretation of information about individuals and organisations.

It uses the **statistical and analytical methods and techniques of the applied social, behavioural and data sciences** to generate insights and support decision-making by providers of goods and services, governments, non-profit organisations and the general public.

Source: ICC/ESOMAR INTERNATIONAL CODE ON MARKET, OPINION AND SOCIAL RESEARCH AND DATA ANALYTICS

TOTAL SCIENCE AND KNOWLEDGE

# Supporting our services for Total Understanding





# The world of data is changing



# Science has a big impact



- Security
- Simplicity
- Speed
- Substance



# Investment in Sciences

A dedicated organisation

With internal experts

To expand and strengthen academic ties

- Neurosciences
- Behavioural sciences
- Social sciences
- Marketing sciences
- Data sciences
- Artificial Intelligence

# KNOWLEDGE-DRIVEN

# The challenge

*"Ipsos knows many things..."*

**42** years

**88** countries

**16,000** people

"...Who to  
talk to?"

...Where can  
I find it? "

# The opportunity



# #1 What Ipsos knows: *the Ipsos Encyclopedia*

## 900 definitions... written and peer-reviewed by Ipsos Experts

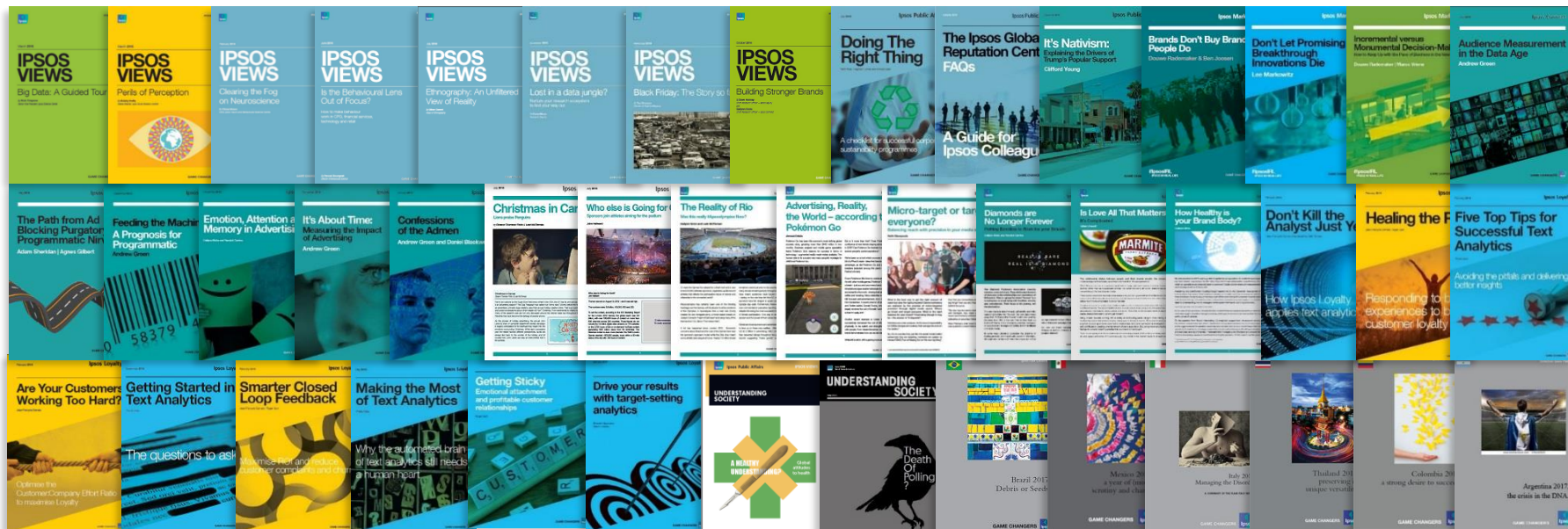


Advertising Tracking Research  
Agent-based Modelling  
Anchoring  
Approach/Avoidance  
Attitudinal Measures  
Attrition Rate  
Audience Measurement  
Behavioural Economics  
Big Data  
Biometrics  
Brand  
Brand Equity  
Brand Essence  
Brand Loyalty

TOTAL SCIENCE AND KNOWLEDGE

## #2 What Ipsos says: *the Ipsos View programme*

*Business, Trends, Society... written & peer-reviewed by Ipsos Experts*





# #3 What Ipsos is doing: *Ipsos Update*

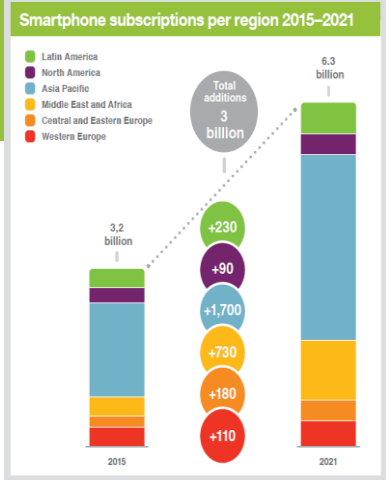
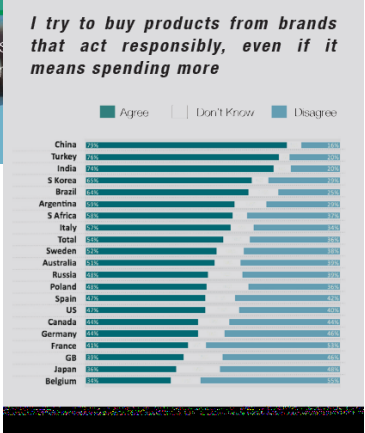
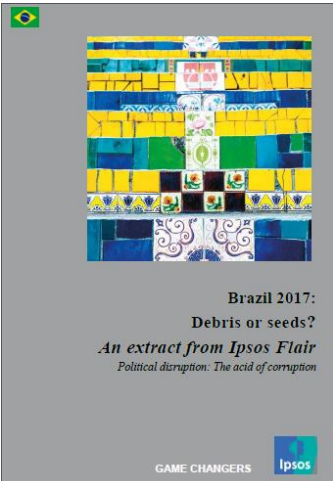
## Monthly highlights... from Ipsos teams around the world





# Deliverables and conversations

“Adding context.”



# SCIENCE-EMPOWERED KNOWLEDGE-DRIVEN TOTAL UNDERSTANDING

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Tuesday 6 June 2017

# Investor day 2017

Break  
10:35 - 10:50

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# Understanding Consumers Pernod Ricard

Lea Turquier

Head of Department, Ipsos UU

Arnaud Caré

Head of Department, Ipsos Connect

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**GAME CHANGERS**

# Business challenge

- Understanding consumer perception of their brands across the world

*To put our consumer at the heart of what we do*

*We must **understand** them*

*See the world through **their eyes***

*Experience the world through **their experience***

- A fierce competition: 14 bidders



Pernod Ricard

*Créateurs de convivialité*

# UNDERSTANDING CONSUMERS AT IPSOS CONNECT AND IPSOS MARKETING

## We shared common views on brands...



# ... and a common will to Change the Game with a new approach

## WHAT THEY USED TO DO

From top-down industry-centric...

- 1.5-hour-long questionnaire
- 150 closed-ended questions
- X 8 categories

## WHAT WE DO



...To bottom-up consumer-centric

- 15 minutes device agnostic
- 20 questions: open-ended  
/ closed-ended & pictures
- Social listening
- Real time social media brand pulse






# Global coverage, local expertise

- Ability to manage and execute the programme worldwide
- Local teams with an expert eye on each market
- Local perspective on social data



# The consumers



Consumers share  
their own  
comments,  
pictures,  
opinions,  
emotions...



# UNDERSTANDING CONSUMERS AT IPSOS CONNECT AND IPSOS MARKETING

## The consumers

### IN OUR SURVEY



Avec des amis  
autour d'un  
barbecue avec le  
chant des cigales  
en arrière-plan



Apéritif entre amis dehors  
esprit serein calme et  
tranquille



A l'apéritif sans vraiment  
d'occasion particulière



### IN SOCIAL NETWORKS



# Consumers' voice at the center

More **relevance**: the mental networks

More **realistic** : consumers' own words

More **sources**: quant, social media, communities

More **depth**: qual analysis

More **dynamic**: the view of the moment

**Universal** way of asking questions through mobile

.... And more **respondent satisfaction** !



*I felt like I wasn't forced into a label,  
and I was free to express myself!  
Thank you!"*

# Leveraging leading-edge data science technics

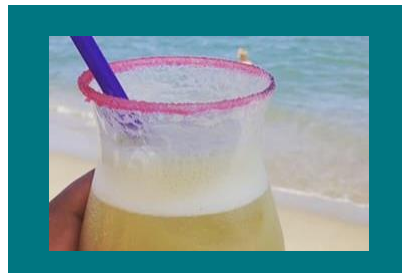
## Photo tagging (1/2)



Landscape mountain  
outdoors rock travel no  
person scenic sky nature  
daylight water hill valley hike  
grass seashore lake tourism  
summer environment



Hammock grass summer  
relaxation leisure outdoors  
no person nature recreation  
lawn sun rope fun fair  
weather park empty bright  
horizontal wood line



Summer tropical beach sand  
drink vacation sea seashore  
exotic ocean glass fruit  
cocktail liquid refreshment  
juice travel food relaxation  
no person



Food lobster dinner  
restaurant cooking seafood  
cuisine epicure lunch hot  
meal spiny lobster no person  
dish pepper plate delicious  
crab crustacean meat

## Leveraging leading-edge data science technics

### Automated quantification (2/2)





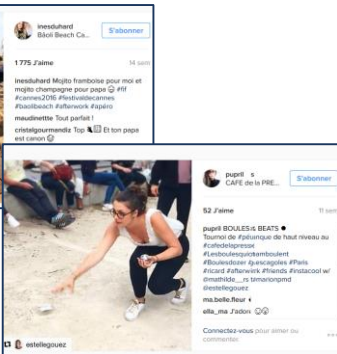


# UNDERSTANDING CONSUMERS AT IPSOS CONNECT AND IPSOS MARKETING

## “L’Apero” is part of French identity

### ON DIVERSE OCCASIONS

End of class/school  
Afterwork  
Family reunions  
Barbecues +++  
PETANQUE (+ Molki)  
Holidays



### AS A TOKEN OF NATIONAL PRIDE



### AND AN ANSWER TO GLOOM AND TERRORISM



Patrick  
@pprem

Suivre

Opération [#fuckDaesh](#) en cours dans le jardin des voisins avec musique, barbecue, champagne, discussions et rires.



# UNDERSTANDING CONSUMERS AT IPSOS CONNECT AND IPSOS MARKETING

## It's all about cheese (and "charcuterie")



CHEESE + ANY ALCOHOL

1/3 OF MENTIONS ARE ABOUT CHEESE OR CHARCUTERIE



### WHISKY + CHEESE



### VODKA + CHEESE



### MOJITO + CHEESE



# Testimonial



*The high level of consultancy is a great strength appreciated by all the stakeholders.*

*The perfect balance between security and disruption. »*

**Florence Rainsard, Global Head of Market Research, Pernod Ricard**

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# THANK YOU



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# Understanding Consumers Uber

Alex Grönberger  
CEO Latin America

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**GAME CHANGERS**



# UNDERSTANDING CONSUMERS

UBER

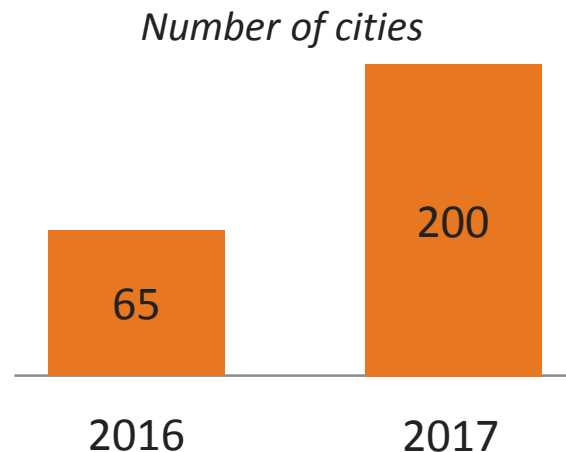
Fast riding in LATAM



# The client's challenge in LATAM

## Uber on an aggressive growth path

- Exit China
- Focus in Latin America
  - Brazil: 3<sup>rd</sup> global market
  - Mexico City & Sao Paulo:
    - The 2 largest Uber cities



UNDERSTANDING CONSUMERS

# The client's challenge



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# The brief

## The (many) client issues

- Attract new drivers & riders
- Manage public opinion & corporate reputation
- Fend off safety concerns
- Success in every market:
  - First, big, fast

## Partner requirements

- ONE team
  - Global player
  - Thorough LOCAL understanding
  - Multiple lines of expertise
- Speed & proactivity





## UNDERSTANDING CONSUMERS

# Why Uber chose us

- Market leader
- Local researchers in 15 countries
- An adaptive research framework: fast moving, incremental market insights
- They loved our point of view to grow Uber as a brand
- Talented dedicated teams mirroring their structure and culture

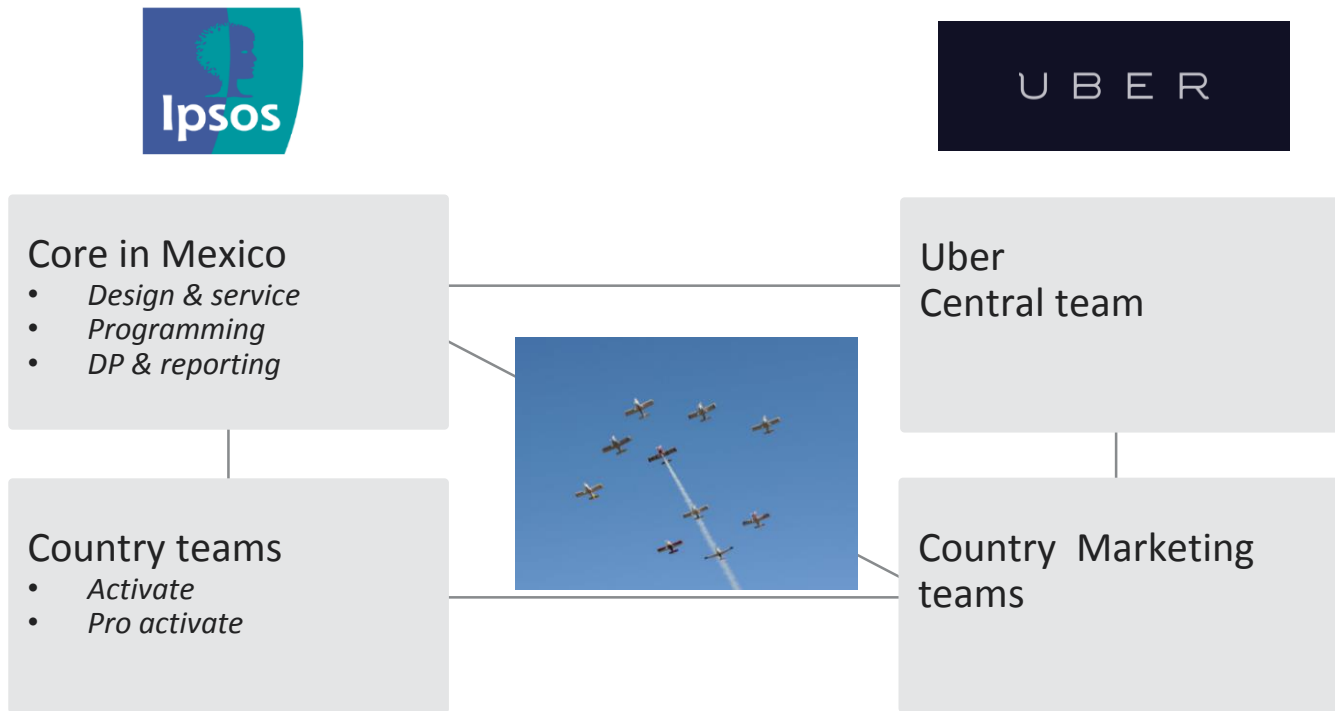


UBER UNDERSTANDING

# Ipsos Uber adaptive research game plan



# Mirroring teams: central grip and local power



# Ipsos Uber Latin America Community

## LatAm Regional Coordination – Based in Mexico



**Olalla Mendez**  
*Mkt Quant Lead*



**Stephanie Trulin**  
*Mkt Qual Lead*



**Daniela Hernández C.**  
*Comms/Tracking Lead*



**Carlos Frias** Client  
*Service Lead (SPOC)*



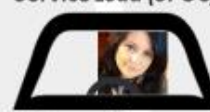
**Karla Chavez**  
*Mkt Quant Manager*



**Rebeca Tollivia**  
*Mkt Qual Manager*



**Mariana Spamer**  
*Comms/Tracking Manager*



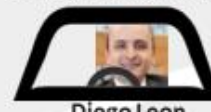
**Isaura Gomez**  
*Proj. Management lead*



**Eugenia Marbec**  
*LatAm Quant Lead*



**Erika Ruiz**  
*LatAm Qual Lead*



**Diego Leon**  
*LatAm Comms/track Lead*



**Selene Odriozola**  
*LatAm Team Leader*

## LatAm/Global Support



**Alessandro Martins**  
*GMU LatAm Analytics*



**Douwe Rademaker**  
*Global Sponsor*



**Seth Traum**  
*Strategy 3 Team*



**Alex Gronberger**  
*Sr. Sponsor LatAm*



**Ricardo Acebo**  
*IIS Online Field*



**Javier Lopez**  
*Sr. Sponsor Mexico*

## Local expertise – Support in the countries



**Leda Kayano**  
*Brasil*



**Diego Pagura**  
*Brasil*



**Maria Molina**  
*Andina*



**Sofia Buitrago**  
*Andina*



**Ana Maria Leyva**  
*South Cone*



**Rodrigo Urti**  
*South Cone*



**Maria Real**  
*Central America*

UBER UNDERSTANDING

# A successful partnership

A clear and structured offer

A dynamic & knowledgeable partner

Answers as fast as booking an Uber ride

An entrepreneurial spirit that matches Uber culture

One team 15 country coverage

UNDERSTANDING CONSUMERS AT IPSOS CONNECT AND IPSOS MARKETING

# Ever faster



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# THANK YOU

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# Understanding Consumers The BBC's Cross Media Insight Project

Liz Landy

Managing Director Ipsos Connect UK

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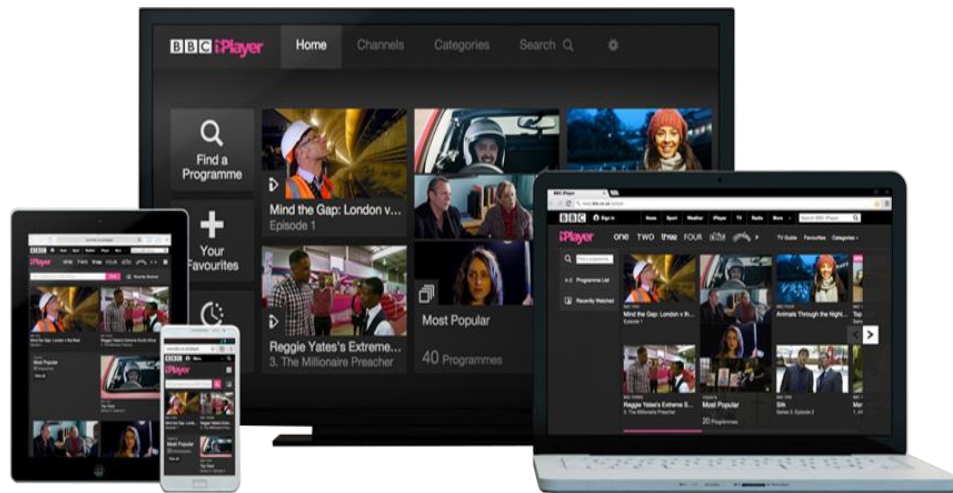
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GAME CHANGERS



## UNDERSTANDING CONSUMERS

# The BBC wants to accurately measure audiences across all their properties and devices



UNDERSTANDING CONSUMERS

# As well as their competitors



# A high profile project that produces measures to help the BBC deliver on key public purposes

Gain insight into  
audience  
behaviour across  
all BBC platforms

Inform business  
and portfolio  
investment  
decisions within  
the BBC

Feed into  
products, product  
development and  
cross media  
commissioning

# UNDERSTANDING CONSUMERS

Our bold solution gradually moves from a solus media diary approach....

to combine with a 360 degree passive measurement methodology....

which records activity and behaviour in real-time...

with little or no effort on behalf of the participant.

## UNDERSTANDING CONSUMERS

# Why is this important?



Consumers have access to a huge variety of content across multiple platforms and devices



This means that declared activity and exposure is increasingly difficult to collect reliably

# UNDERSTANDING CONSUMERS

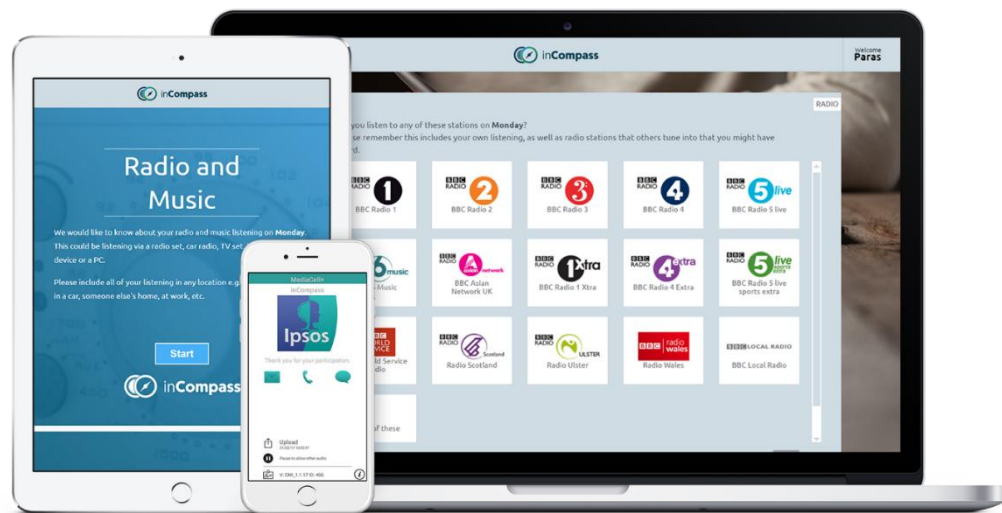
Different tools exist but no single, passive cross-media solution...



... until now.

## UNDERSTANDING CONSUMERS

# We designed a pioneering approach to cross-media measurement combining multiple elements



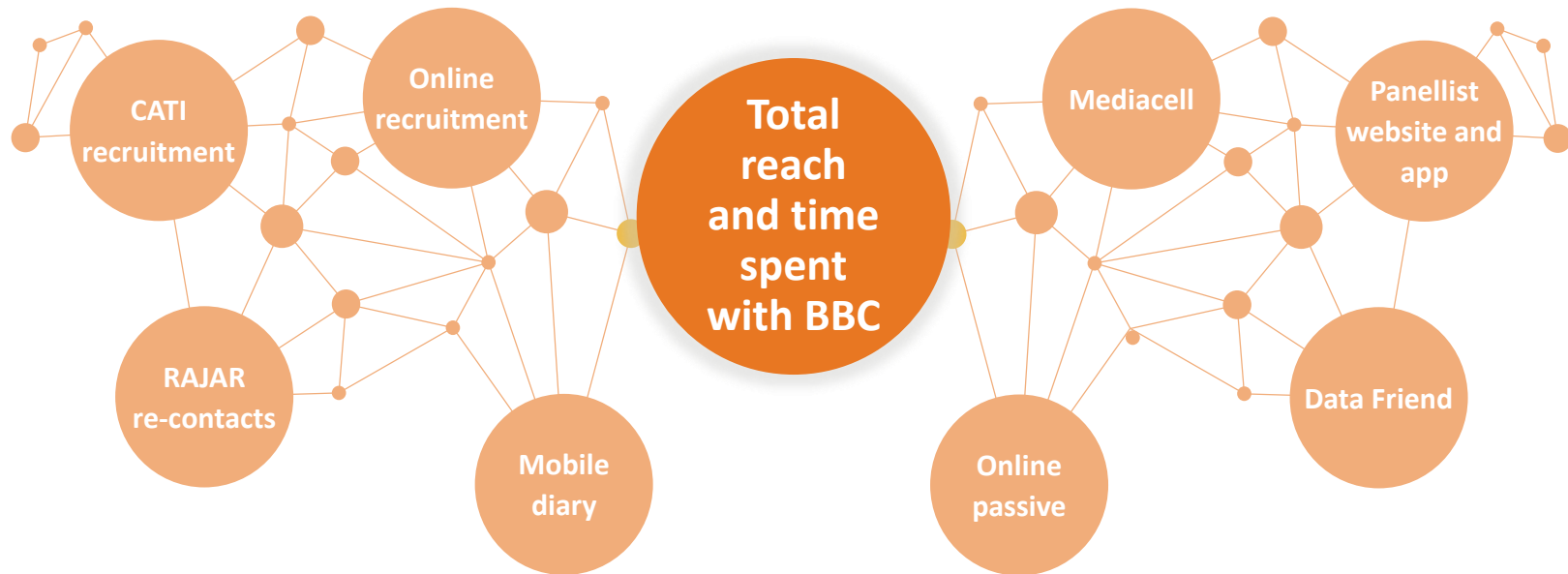
Mediacell for TV, radio and on-device use of website and apps (mobile) via one single app

Passive measurement of website and app usage across other devices

Supplemented by a mobile-first media diary

A 2,000 UK representative online & offline panel

# A complex network of technology and data sources come together to deliver clear outputs





# We have made impressive progress towards a September reporting launch



**Data collection  
has fully launched**



**700+ passively  
monitored**



**350+ media  
diaries per week**

## UNDERSTANDING CONSUMERS

1

Cross Media Insight (CMI) is leading the way in the future of passive, cross-media measurement

2

We are proving our ability to combine multiple technology and datasets in one innovative design

3

Next step is to integrate with existing gold standard industry currencies for even greater impact – and we're making it happen.

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# Understanding Patients

Pierre Le Manh

Ipsos Deputy CEO, CEO North America

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**GAME CHANGERS**



UNDERSTANDING PATIENTS AT IPSOS HEALTHCARE

Ipsos Healthcare

# Inspiring Better Healthcare





# Reflecting a shift of focus



**Physicians**



**Payors  
(and cost containers)**



**Patients  
(and caregivers)**

# Pharma CEO statements convey that push...



*"Our vision is to change patients' expectations – to **provide a new sense of hope for people** suffering from some of the world's most debilitating diseases."*

**Dave Ricks, CEO, Eli Lilly**

The Roche logo, featuring the word "Roche" in a blue, sans-serif font inside a blue hexagonal border.

**Roche**

*"**Improve patients' lives** and, where possible, help them live longer, is the goal that drives us day in and day out at Roche."*

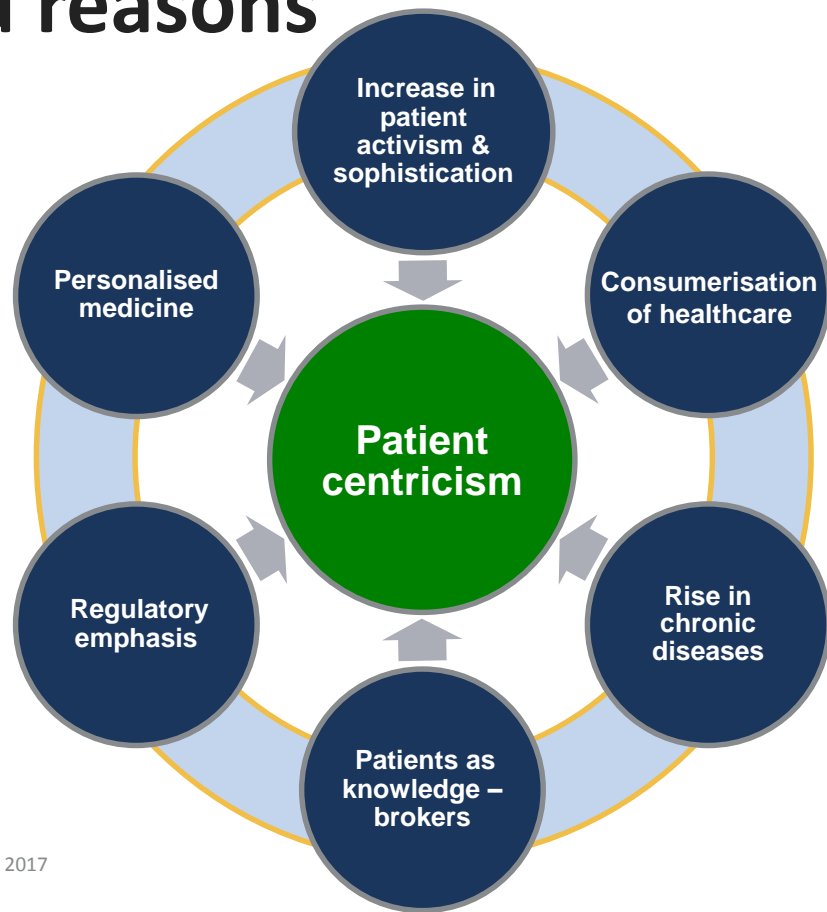
**Dr. Severin Schwan, CEO, Roche**



*"Our work continues to be driven by an **unwavering commitment to the people at the center of everything we do** – our patients and their families."*

**Giovanni Caforio, CEO, BMS**

# ... for good reasons



## KEY QUESTIONS

*Who are my patients really?*

*How do they experience the disease?*

*What are their struggles?*

*What is the language they use to describe their struggles?*

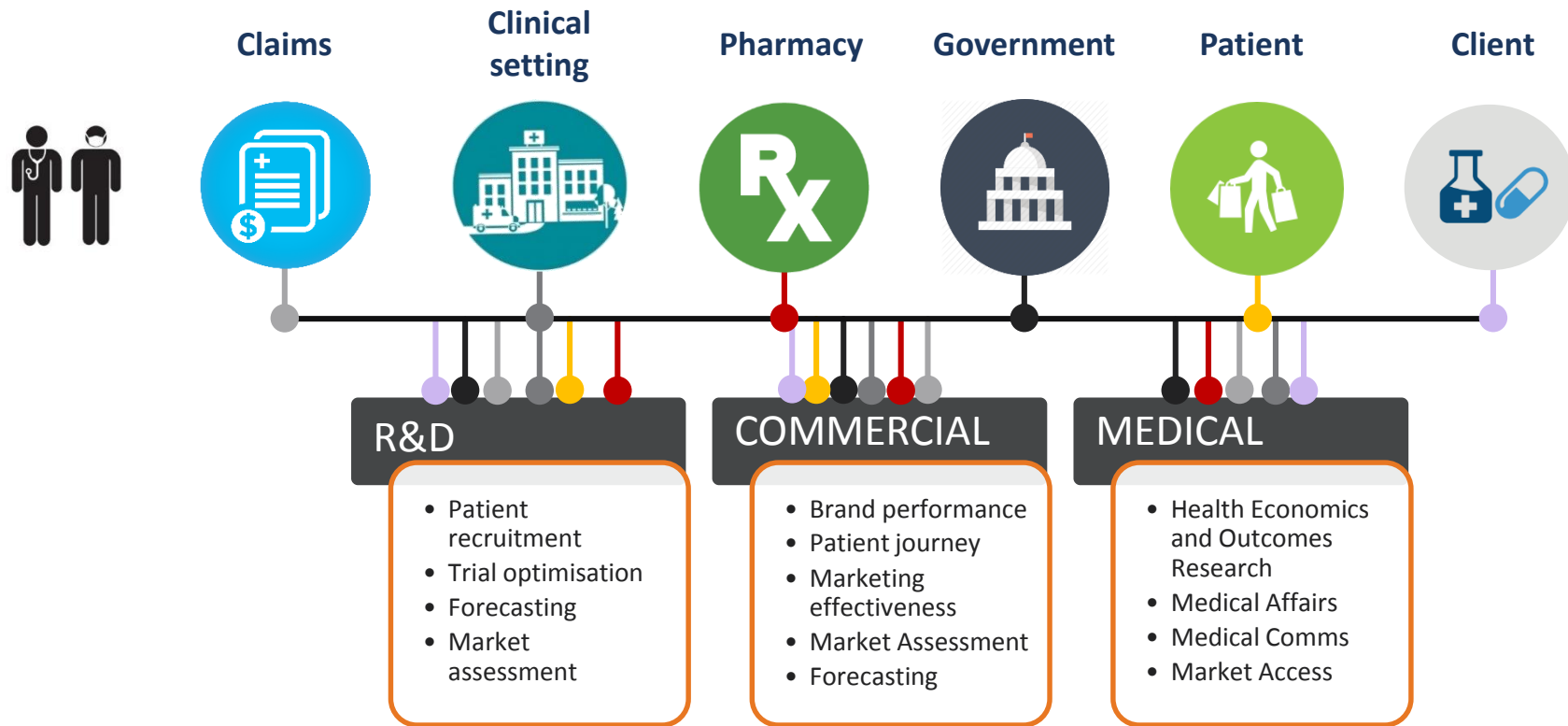
*Which co-morbid conditions do they suffer with?*

*What impacts standards of care?*

*What does this mean for my brand?*



# It fosters the rise of Real World Evidence (RWE)



# Ipsos is a player in Real World Evidence

## From Doctors

- Therapy monitors = information pulled directly from the patient's medical chart

## From Patients' Own Perspective

- Ethnography
- Immersions
- Patient self-completion questionnaires

## Currently being piloted / developed

- Syndicated Social Intelligence and Machine Learning Text Analytics
- Tracking use of connected health devices by disease area
- Syndicated patient/caregiver communities
- "Open up" health app

# Our Global Therapy Monitors capture over 70% of diseases currently investigated in clinical trials



## Oncology

- Oncology
- (Oncology Molecular Diagnostics)



## Virology & Liver Diseases

- HIV (+ HIV SCOPE)
- Hepatitis B
- Hepatitis C
- Non-alcoholic Steatohepatitis (NASH)



## Autoimmune

- Rheumatoid Arthritis
- Psoriatic Arthritis
- Psoriasis
- Ankylosing Spondylitis
- Crohn's Disease
- Ulcerative Colitis
- Multiple Sclerosis
- Lupus
- Non-Radiographic Axial Spondyloarthritis
- Atopic Dermatitis
- Hidradenitis Suppurativa



## Diabetes & Cardiovascular

- Diabetes
- Venous Thromboembolism
- Stroke Prevention in Atrial Fibrillation
- Pulmonary Arterial Hypertension
- Chronic Thromboembolic Pulmonary Hypertension
- Hypertension
- Hyperlipidemia
- Hemophilia



## Respiratory

- Chronic Obstructive Pulmonary Disorder (+ Severe COPD)
- Asthma (+ Severe Asthma)

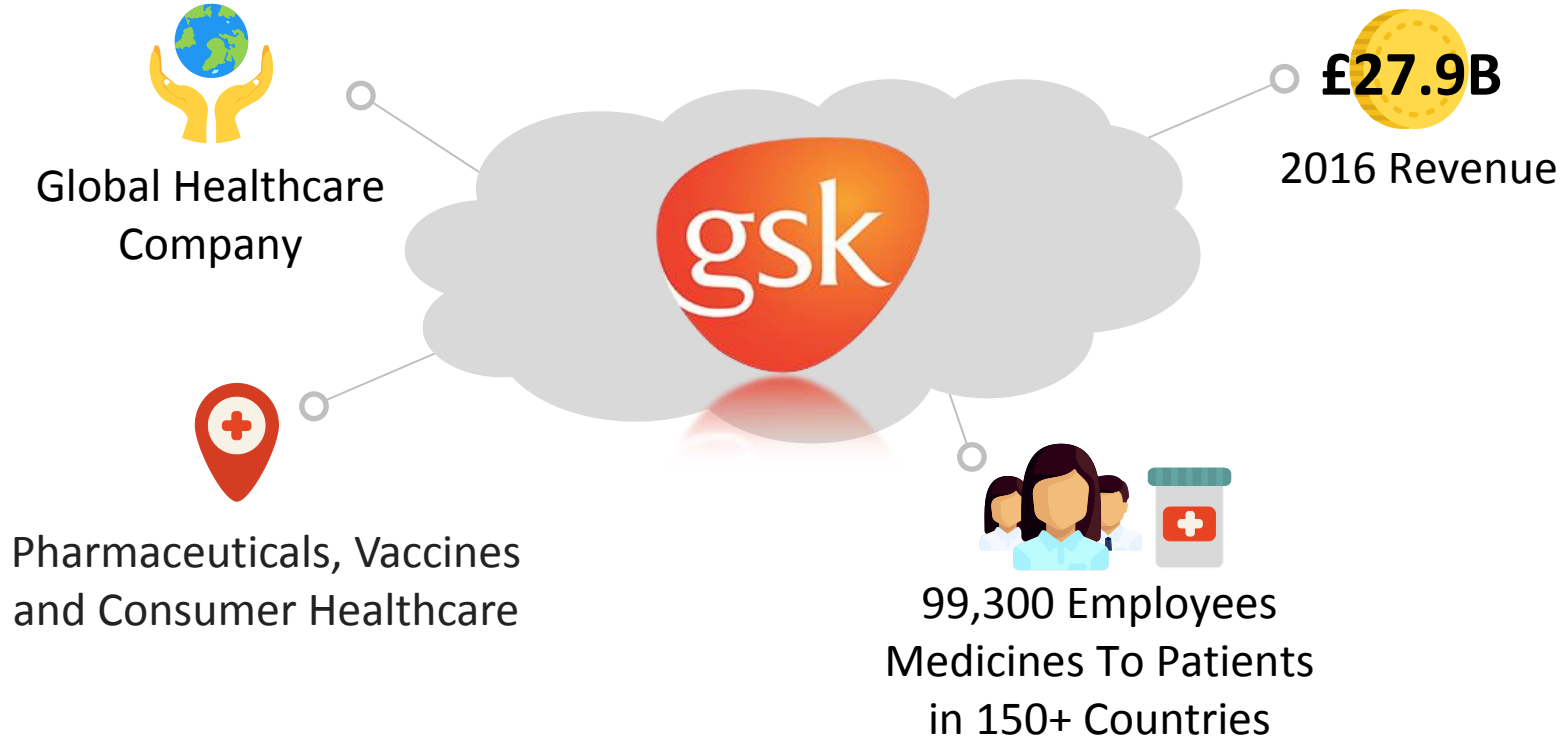


## Other

- Cluster Headaches

*Note: Not all monitors run in every market*

# We leverage Ethnography to help GSK



UNDERSTANDING PATIENTS AT IPSOS HEALTHCARE

# Chronic Obstructive Pulmonary Disorder (COPD) Patient Ethnography & Journey Research



## UNDERSTANDING PATIENTS AT IPSOS HEALTHCARE

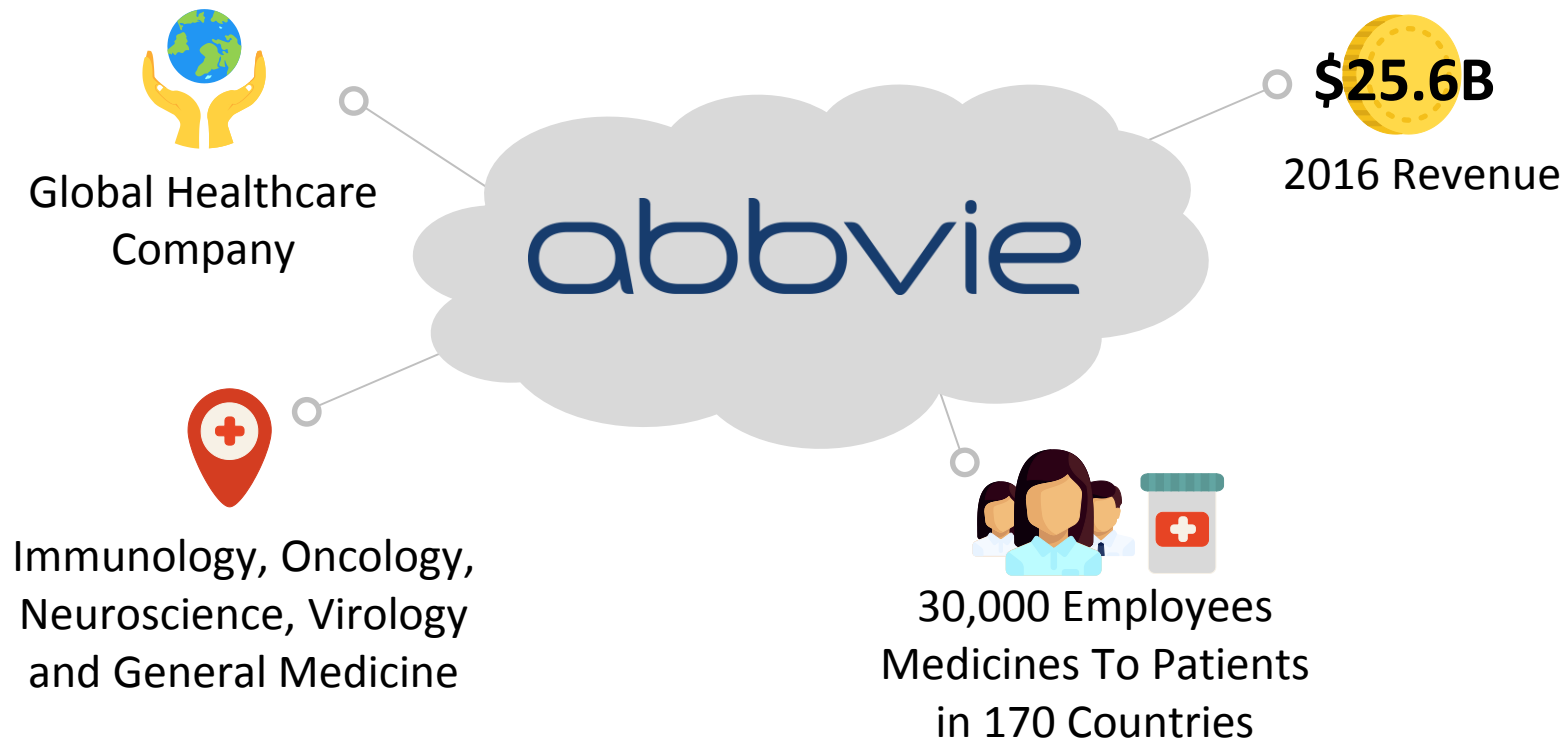
*“The work from Ipsos has **fundamentally changed the way** we work with our brands; it has made it **infinitely more patient-centric**, meaning that we are now able to really know and speak to our consumers. Our Global Head of Respiratory couldn’t believe the impact it has had on our entire team, globally.”*



**Wendy Kehoe,**  
Customer Insight Director,  
Respiratory, GSK

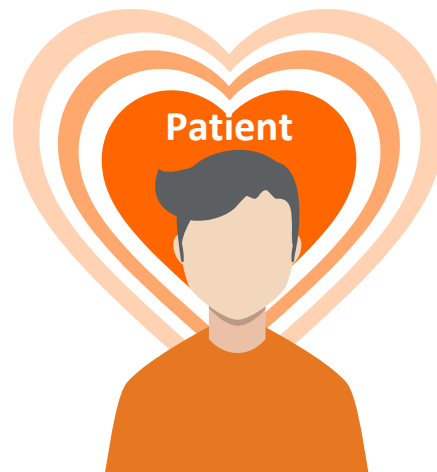


# We leverage Immersions to help Abbvie



# Abbvie's CEO mandate to Brand Teams

*"We want to become a more patient-centric company"*



"Ipsos is a pretty creative partner, what could they do?" The birth of immersions.



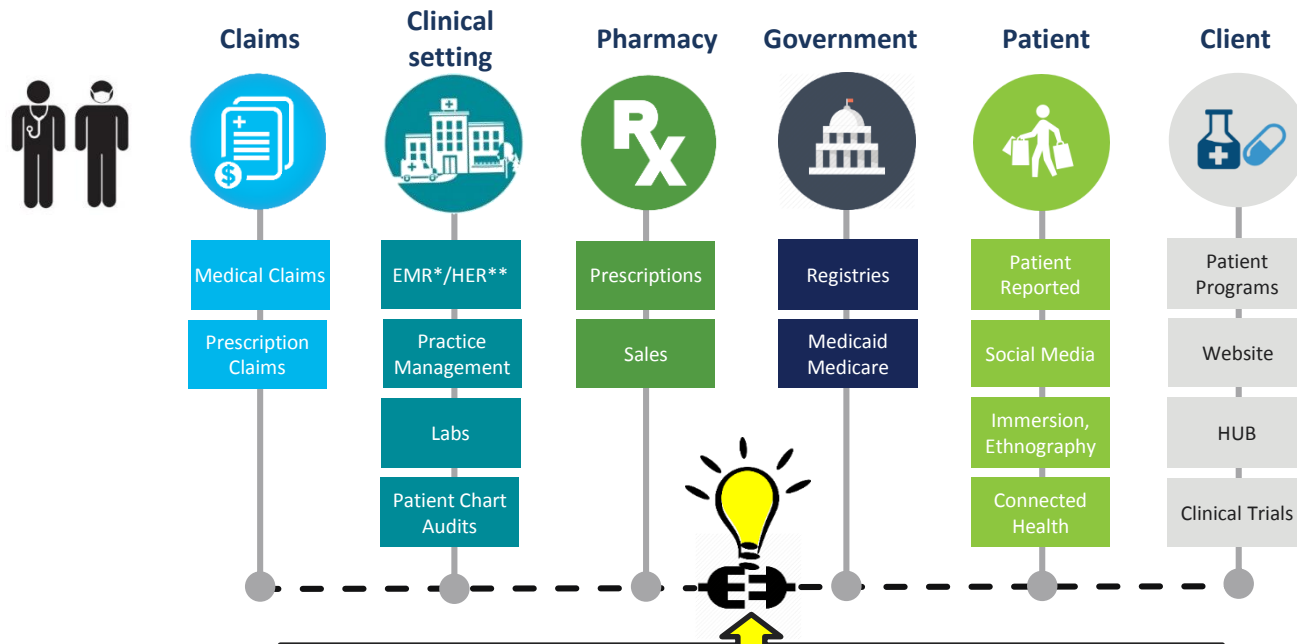
# UNDERSTANDING PATIENTS AT IPSOS HEALTHCARE



# Immersions have gone viral at Abbvie



# Our opportunity is to integrate RWE sources...



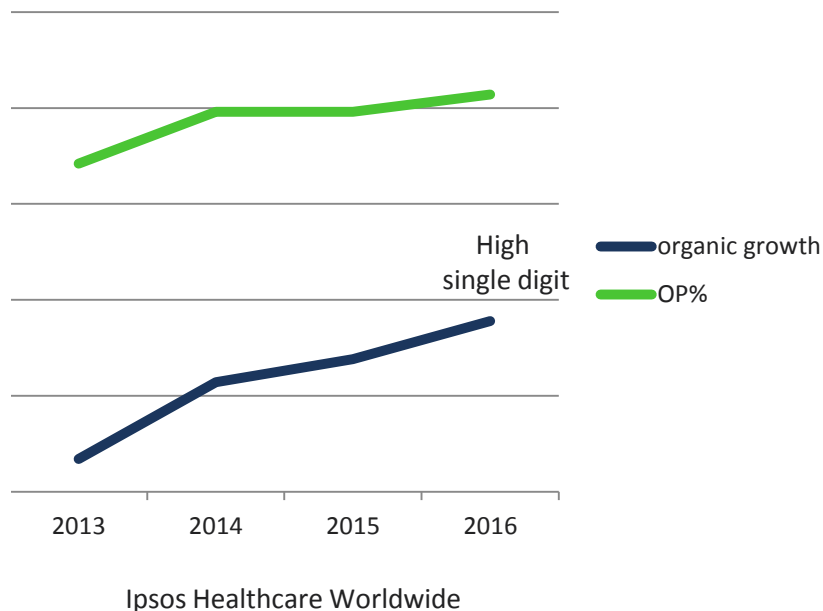
BIG DATA challenges: our clients are investing much efforts and facing many challenges integrating dispersed Real World Evidence (RWE) data sources to drive impactful insight.

\* Electronic Medical Record

\*\* Electronic Health Record

# ... to build on our healthcare practice's success

Both organic growth and  
Operating Profit %  
significantly exceed Ipsos'  
average



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# THANK YOU

# Investor day 2017

## Understanding Citizens UK elections

Ben Page  
CEO Ipsos MORI

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**GAME CHANGERS**





GAME CHANGERS



# Crisis of the elites?

**My government does not prioritise the interests of people like me**

**71%**

**Economy rigged for advantage of the rich and powerful**

**76%**

**Feel like a stranger in my country**

**46%**

**Don't identify with what my country has become**

**59%**

**Experts don't understand my life**

**69%**

**Wish we had a strong leader not current elected government**

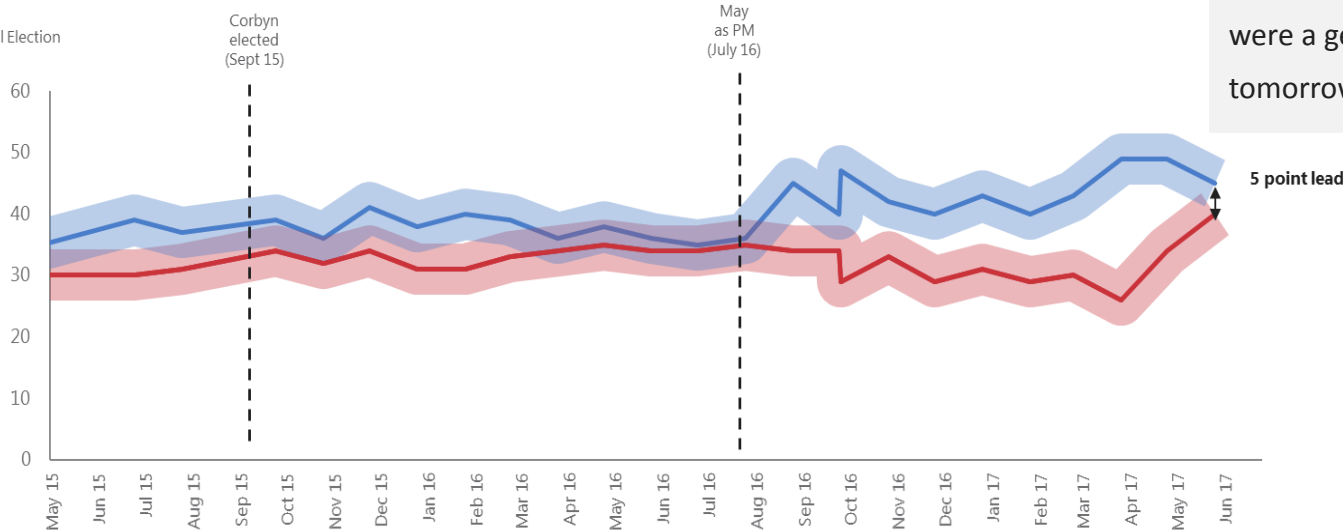
**58%**



UNDERSTANDING CITIZENS AT IPSOS PUBLIC AFFAIRS

# Narrow Conservative lead at the national level

2015 General Election



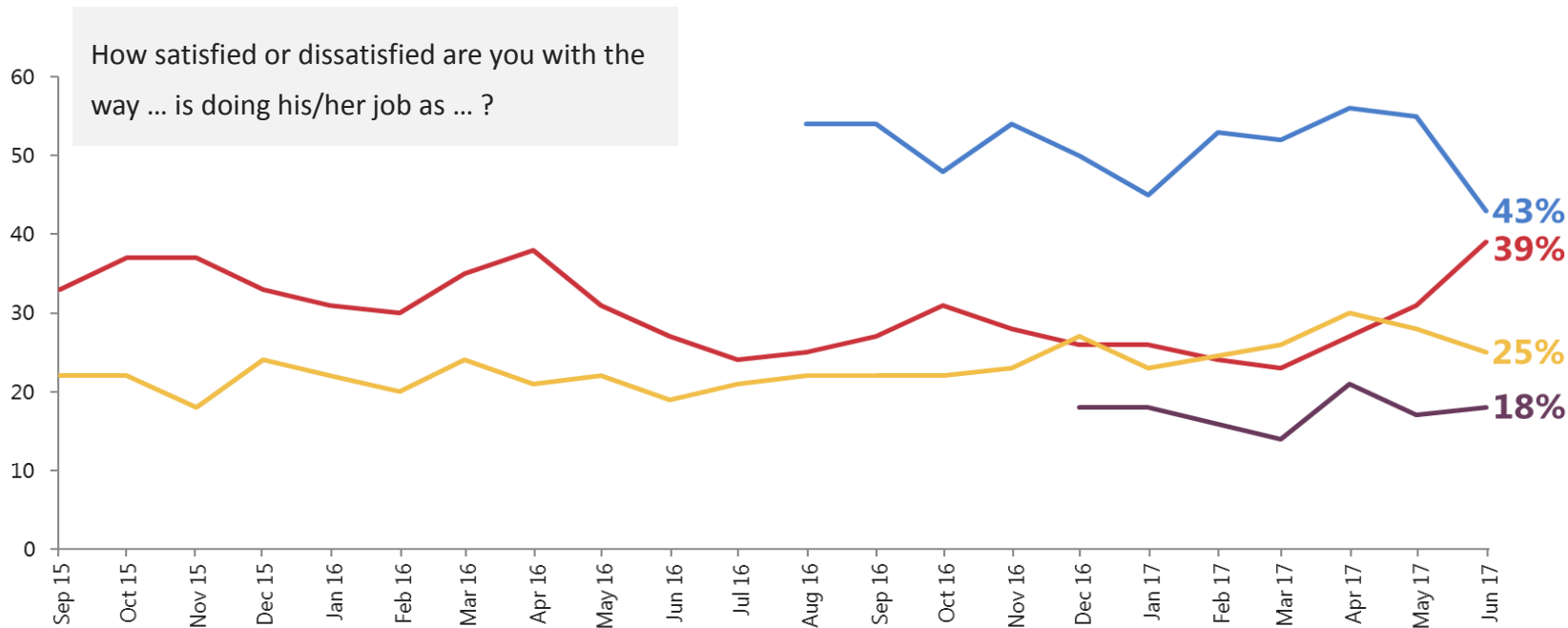
CONSERVATIVE

LABOUR

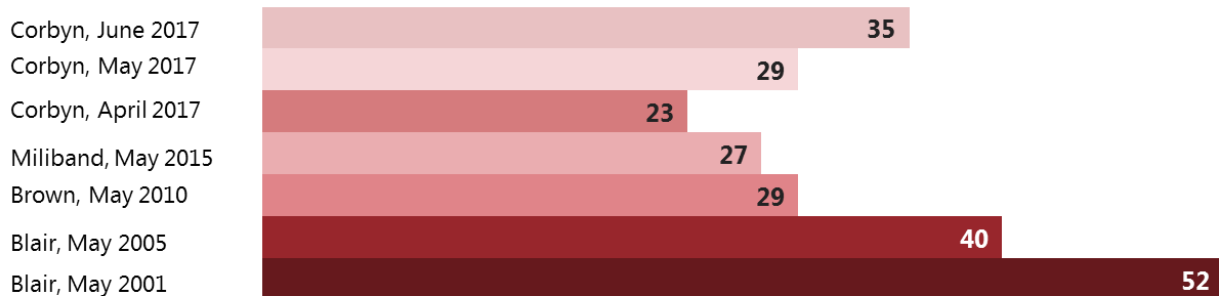
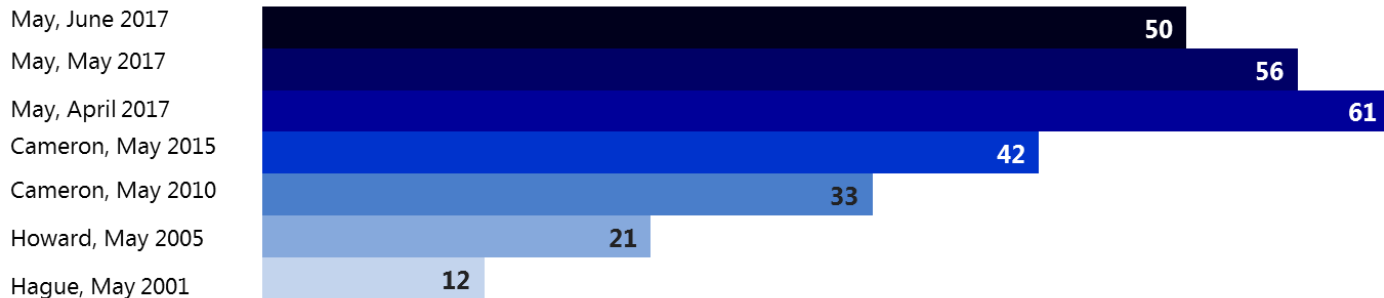
CONSERVATIVE (ERR 4%)

LABOUR (ERR 4%)

# Campaign has seen sharp fall in Mrs May's ratings

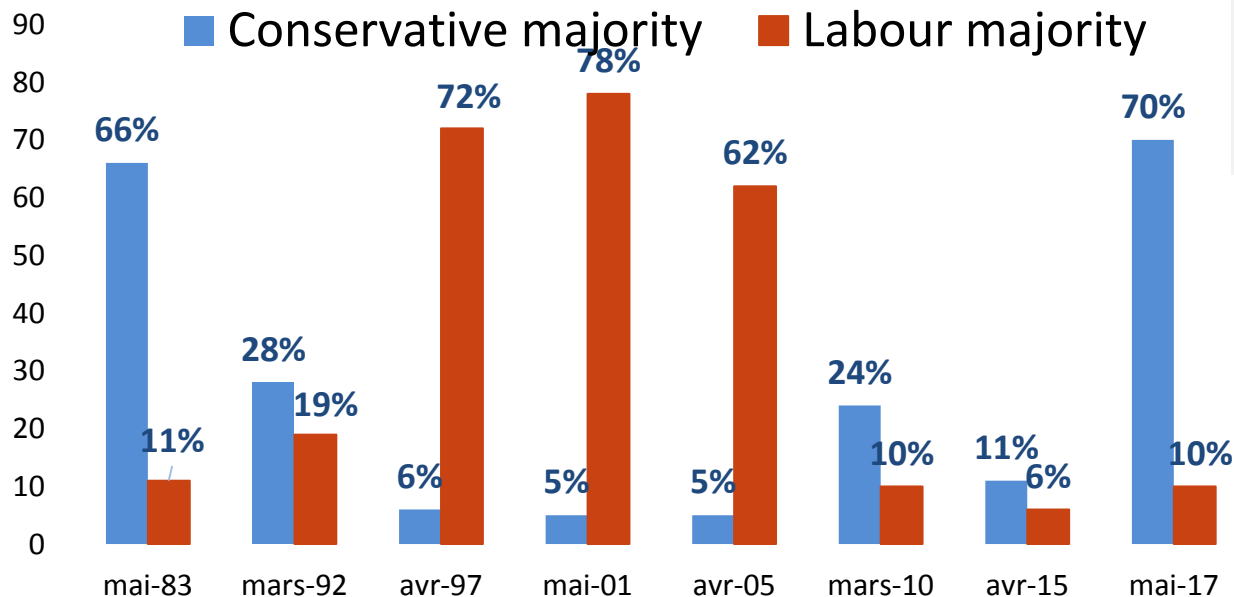


# Campaign has seen sharp fall in Mrs May's ratings



Who do you think would make the most capable prime minister, the Conservatives' Theresa May, or Labour's Jeremy Corbyn?

# Public expectations of a Conservative victory in line with previous big wins



What do you think will be the outcome of the forthcoming election?

Note: Question wording and answer options have varied over the years so comparisons should be made carefully

Base: 1,053 British adults 18+, 15<sup>th</sup>-17<sup>th</sup> May 2017

UNDERSTANDING CITIZENS AT IPSOS PUBLIC AFFAIRS

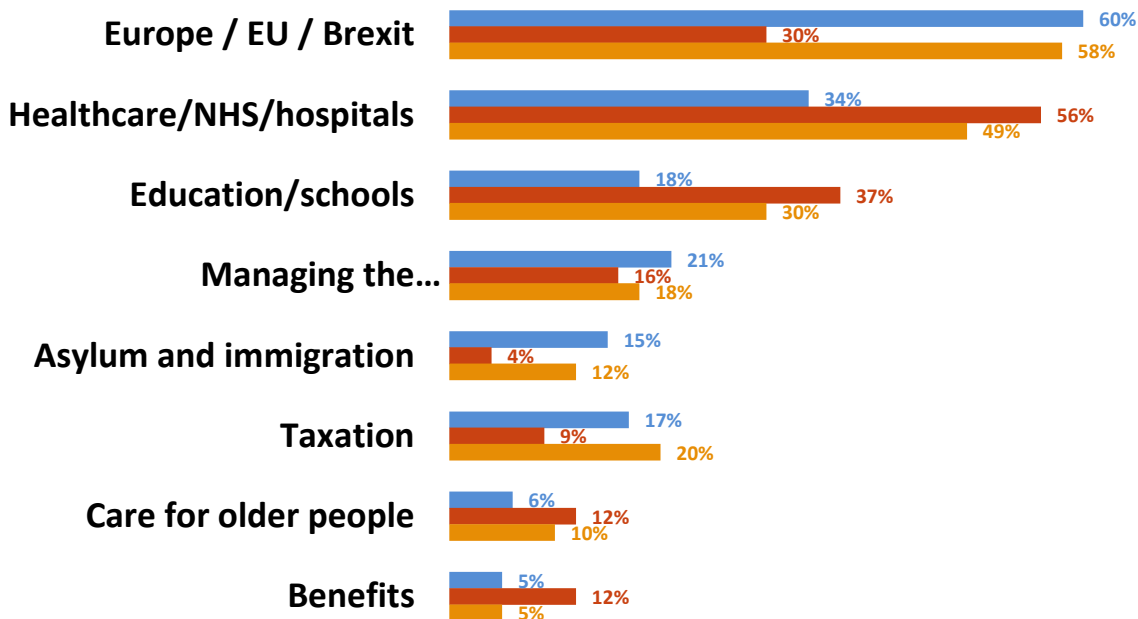
# It is a Brexit election



GAME CHANGERS



# NHS and Brexit are the two most important issues

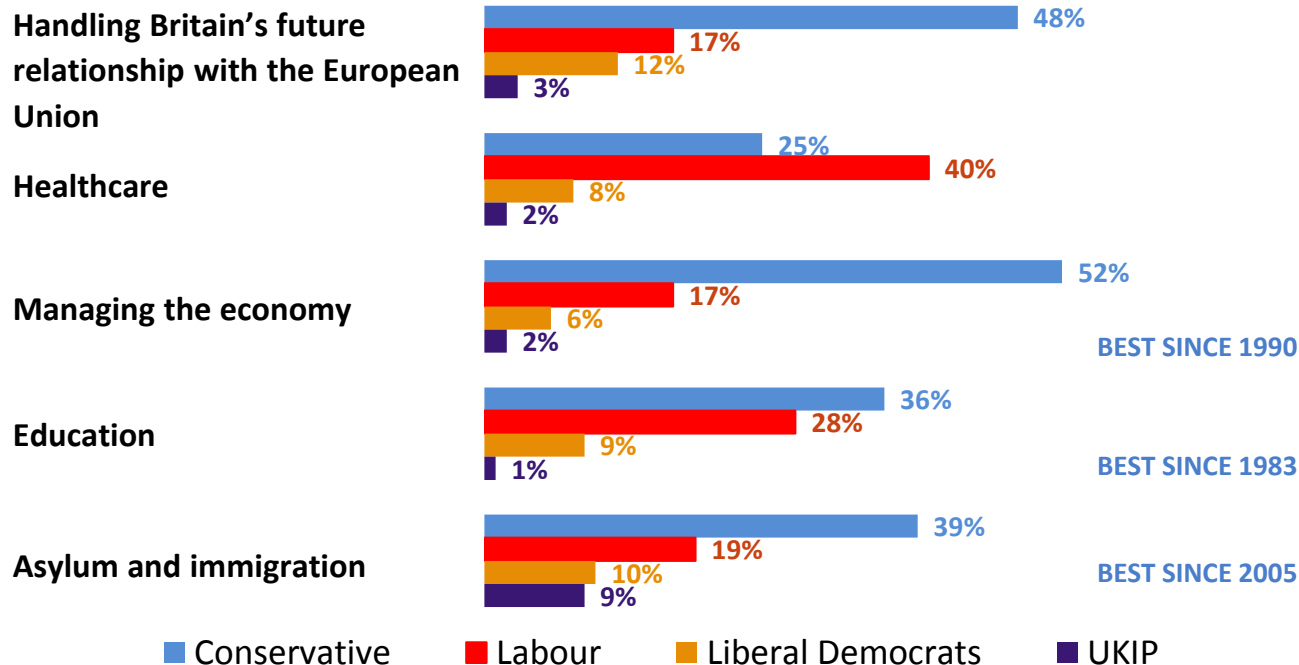


Which, if any, issues do you think will be very important to you in helping you decide which party to vote for?\*

(UNPROMPTED)

■ Con ■ Labour ■ LibDem

# And Conservatives lead on four out of top five issues



Which party do you think has the best policies on.... the Conservatives, Labour, Liberal Democrats or some other party? Which party do you think has the best policies on.... the Conservatives, Labour, Liberal Democrats or some other party?



# How have we done around the world?

132



# How have we done around the world?

Italy 2013		South Africa 2014		Sweden 2014		GB 2015		Netherlands 2015		Ireland 2016		Brexit 2016		Netherlands 2017		France 2017 (2 <sup>nd</sup> round)	
Poll	Result	Poll	Result	Poll	Result	Poll	Result	Poll	Result	Poll	Result	Poll	Result	Poll	Result	Poll	Result
Riv C 3.3%	2.3%	ANC 63%	62.2%	Mod 21.7%	23.3%	Con 36%	37.7%	VVD 15.8%	15.9%	FF 23%	25%	Remain 52%	48.1%	VVD 19.2%	21.3%	E. Macron 65.8%	66.1%
Centre Left 34.4%	29.5%	DA 22%	22.2%	Lib 6.4%	5.4%	Lab 35%	31.2%	PvdA 10%	10.1%	FG 28%	26%	Leave 48%	51.9%	PVV 12.9%	13.1%	M. Le Pen 34.2%	33.9%
Centre 11.9%	10.6%	EFF 5%	6.4%	Cen 5.7%	6.1%	UKIP 11%	12.9%	CDA 15.5%	14.7%	Lab 6%	7%			CDA 15.3%	12.5%	Blank votes 8.9%	8.6%
Centre Right 28.3%	29.2%	Other 10%	9.3%	KD 5.7%	4.6%	LibDem 8%	8.1%	PVV 10.8%	11.7%	SF 15%	14%			D66 12.2%	12%		
5* 20%	25.6%			Soc Dem 28.6%	31%	Other 10%	10.2%	SP 12.3%	12.4%	Other 28%	29%			SP 10.2%	9.1%		
Other 2.1%	2.8%			Van 7.6%	5.7%			D66 12.3%	12.4%					Green Links 9.7%	8.9%		
				MP 10.3%	6.9%			GL 6.1%	5.3%					PvdA 5.8%	5.7%		
				SD 9.4%	12.9%			CU/SGP 7.1%	7.5%					CU 3.3%	3.4%		
				FI 3.6%	3.1%			5OPLUS 3.1%	3.4%					5OPLUS 3.3%	3.1%		
								PvdD 3.5%	3.8%					PvD 2.9%	3%		
								Other 3.4%	3.8%								
Average error	2.4	Average error	0.8	Average error	1.6	Average error	1.5	Average error	0.4	Average error	1.4	Average error	3.9	Average error	0.8	Average error	0.3

The performance of the polls, from the good to the could-do-better

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# Understanding Citizens French elections

Brice Teinturier

Deputy CEO, Ipsos in France

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**GAME CHANGERS**

# A particularly complex and unusual election (1/2)

## FOR THE 1<sup>ST</sup> TIME:

- **Candidate selection**

- Candidates emerge from primary elections
- Outgoing President forced not to run for office again
- No designated successor / No record under scrutiny

- **Information**

- Numerous televised debates
- Ubiquity of social networks
- Permanent suspicion about the accuracy of information

# A particularly complex and unusual election (2/2)

## FOR THE 1<sup>ST</sup> TIME:

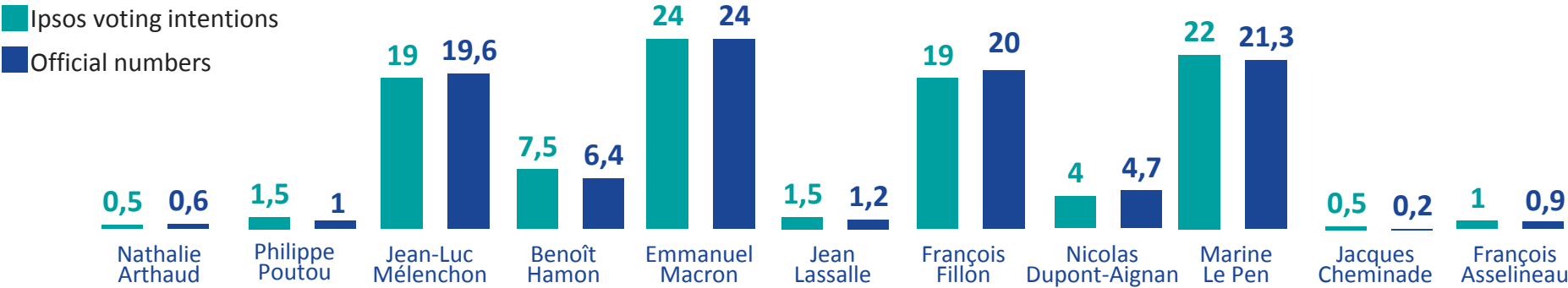
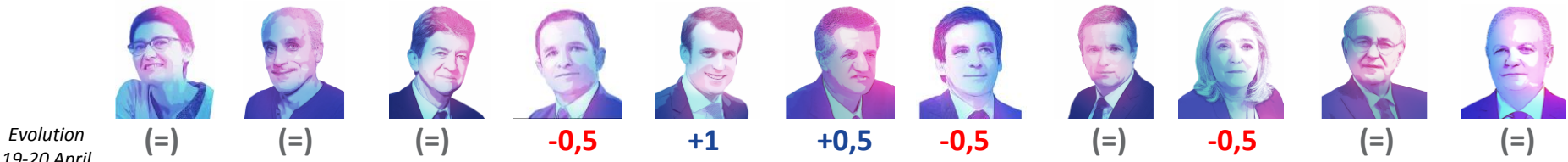
- **The overriding structural theme**
  - Is not set by any single candidate
  - Though renovation and renewal of political life is the real driving force
- **Traditional cleavages**
  - Left-right-wing cleavage weakened and challenged by 2 other cleavages: people-elite, open-closed
  - The 2 front-running candidates are not from the major parties
- **Political environment plays a key part**
  - Financial affairs & resulting legal proceedings a determining factor

# All in all

- A destabilised election
- A narrowing of the gaps between the candidates in the final stages of the campaign with momentum from Mélenchon, and Fillon maintaining his ground, made the question of who would qualify for the 2<sup>nd</sup> round even more uncertain
- Nevertheless, remarkably accurate polling!!

# First-round voting intentions and official numbers

Base : Certain to vote, stated intention



People certain to vote who have not stated an intention to vote: 7%

# Key contributing factors to success (1/3)

- **Our academic ties and the mastery of an exceptional tool : the Ipsos CEVIPOF panel**
  - A real panel, charting the dynamics of electoral mobility
  - Unprecedented sample size (24,000 voters, over 15,000 respondents at campaign-end): outstanding robustness, ability to perform detailed research
  - Advantages of online data collection
  - Quality of political representativeness
- **Much research**
  - On quotas (modified age, degree, urban/rural category)
  - On respondents (results analysed according to time of response and day of the week)
  - On data collection methods (comparison via simultaneous telephone / face-to-face / online surveys)



# Key contributing factors to success (2/3)

- **Background and experience**
  - Analysis of collection biases through all elections since 2012
  - Key lessons from the 2012 panel with CEVIPOF
- **Our Access Panel (Ipsos Interactive Services)**
  - No equivalent within other polling organisations
  - Qualities of team and process

# Key contributing factors to success (3/3)

- **A new way of working**

- Ipsos Group programme including workshop sessions with an Ipsos expert (outside of Ipsos Public Affairs) to assess and validate methodology

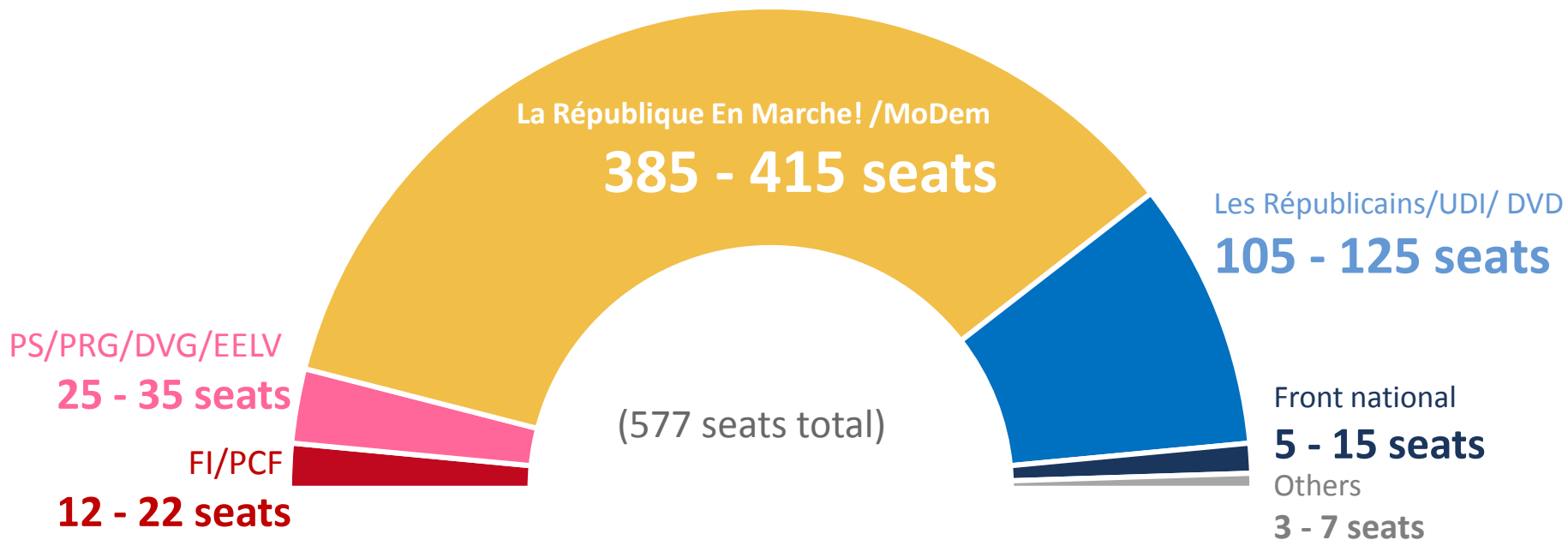
- **For election night estimates**

- A sample of 500 voting stations to overcome the challenge of stations closing early
- A proprietary estimation chain
- Great experts

# Upcoming legislative elections

- CEVIPOF panel, as always
- Simulation models on a seat basis

# Upcoming legislative elections: Seat projections



Base: 2 103 respondents, June 2 -4 2017

# What about tomorrow?

- **Great ambition to perpetuate the CEVIPOF panel, academic ties, and research**
- **And sustain other success factors:**
  - Work with stringent and powerful media
  - Enjoy a strong economic model (partners such as Sopra Steria) to guarantee resources
  - Maintain large samples

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# Q&A



Tuesday 6 June 2017

# Investor day 2017

GAME CHANGERS

