

# INVESTOR DAY 2019

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NOVEMBER 7TH, 2019

GAME CHANGERS





# BUILDING ON SUCCESS

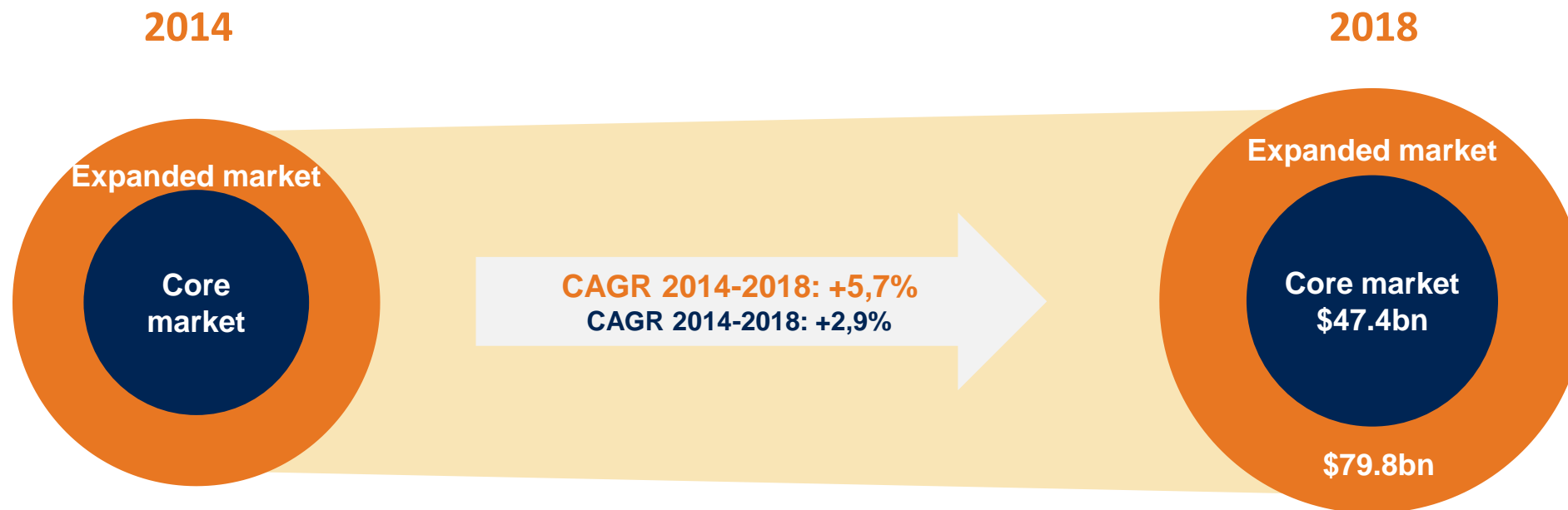
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Didier TRUCHOT, Ipsos Chairman & CEO

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# A GROWING RESEARCH MARKET

Growing addressable market supported by both the core market and the new segments



## Expanded market

2018 market growth: **+6.2%**<sup>(1)</sup>

Growing sub-segments:

- *Online Analytics*: **+8.5%**
- *Social Media Monitoring*: **+12.5%**
- *Survey Software*: **+14.0%**

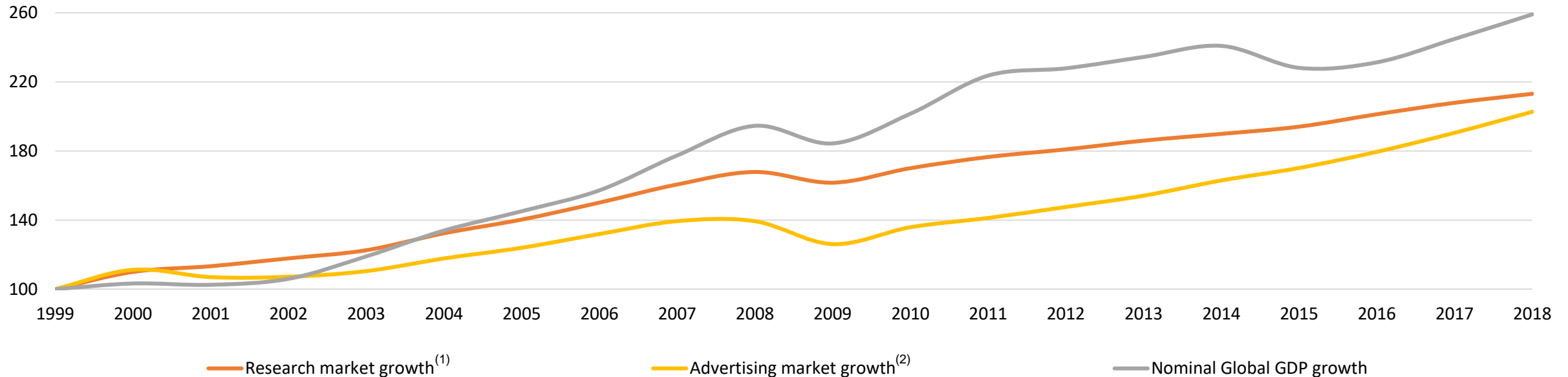
## Core market

2018 market growth: **+2.1%**<sup>(1)</sup>

Sources: ESOMAR Global Market Research 2019  
Note 1: Current currency basis

# A RESILIENT RESEARCH MARKET

Compared growth (research market vs. advertising market vs. global GDP; Index 100 in 1999)



Research market is steadily growing each year since 2000, and quickly recovered after 2009

Research market is less volatile than the global advertising market

Ipsos generates faster-than-market organic growth rate (+4.9% for Ipsos vs +4.1% for the market on average since 2000)

Sources: ESOMAR Global Market Research 2019, Zenith Global Intelligence, IMF

Note 1: Core market growth rate, Constant USD growth

Note 2: Current price basis



# A TRANSFORMING RESEARCH MARKET

## PROLIFERATION OF DATA SOURCES

- Surveys, panels
- Social Media Monitoring
- Big Data, CRM, IoT, Open Data
- Qualitative and non-verbal techniques (Neuroscience, ethnography)
- Passive measurement of behaviour



# A UNIQUE POSITION TO SATISFY **ALL MARKET NEEDS**



MASTERING  
MULTIPLE  
DATA SOURCES



**90**  
MARKETS  
**200**  
CITIES



**3<sup>rd</sup>**  
LARGEST MARKET  
RESEARCH COMPANY IN  
THE WORLD



**18,000**  
EMPLOYEES



OVER  
**5,000**  
CLIENTS



**75**  
SERVICES



# THE PILLARS OF TOTAL UNDERSTANDING

## SERVICES

- Ensure competitiveness of all our services
- Use the New Services

## CLIENT ORGANISATION

- Better management of our client relationships, globally and locally
- Re-balance the client base among sectors

## STRONG LOCAL PRESENCE

- Greater responsibility of local markets
- Greater presence in key markets

## REINFORCED CROSS-COMPANY CAPABILITIES

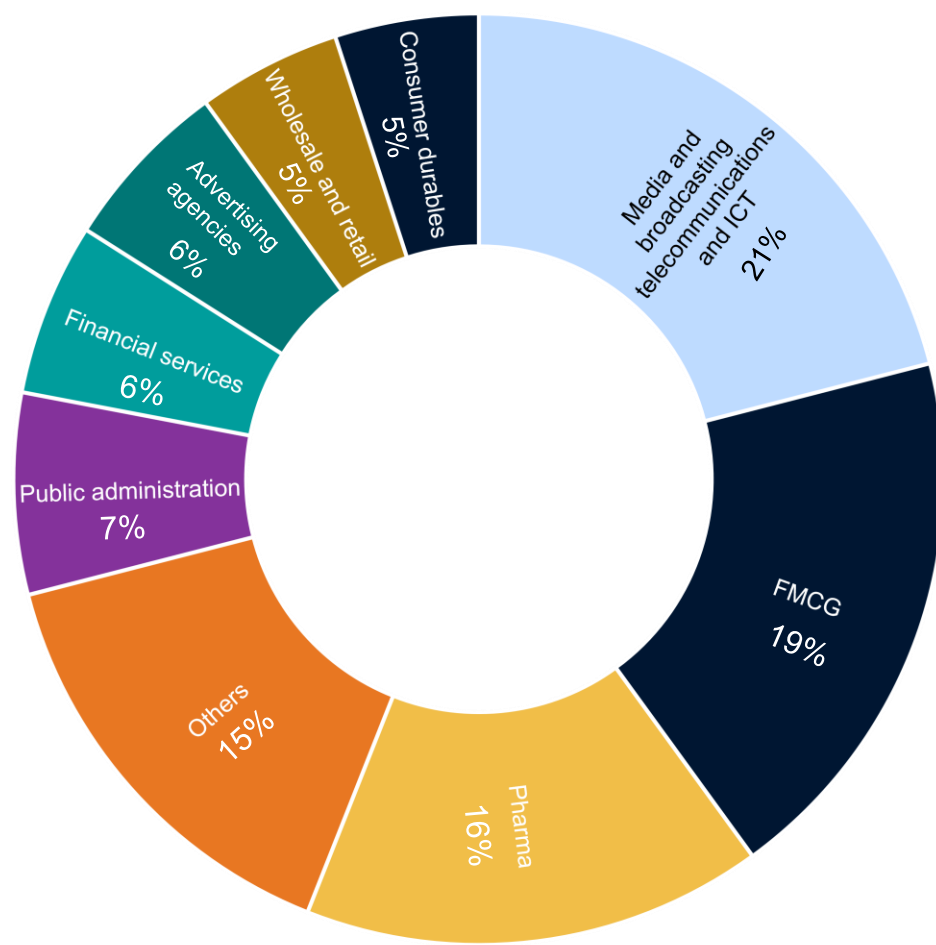
- Science Team A
- Tech Team A
- Ipsos Knowledge Centre

## ACQUISITIONS

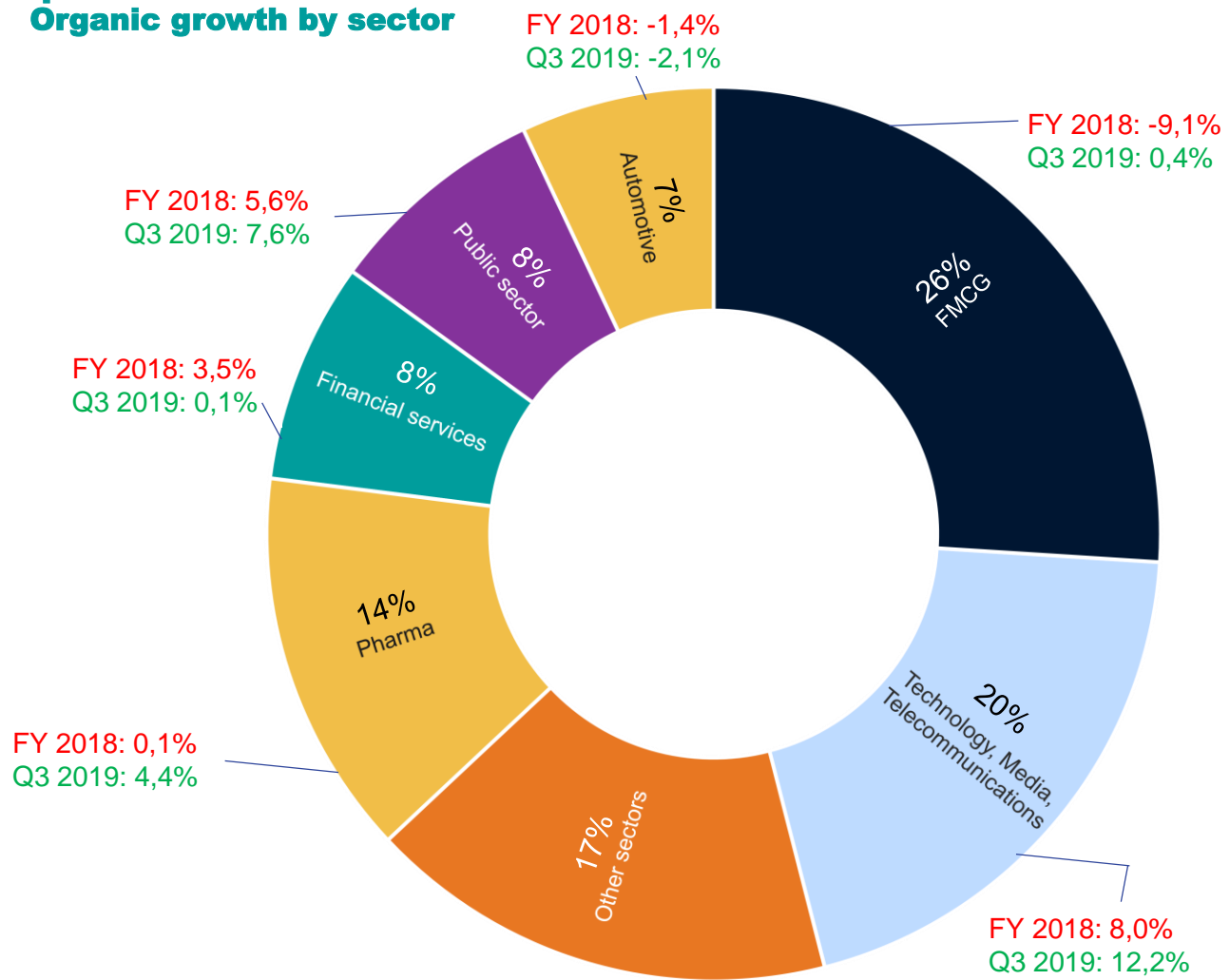
- Opportunity
- Technology
- Know-how

# A BROAD CLIENT BASE

**Market: Diversified end-markets  
(2018 spend by customer type)**



**Ipsos: Diversified client base  
Organic growth by sector**



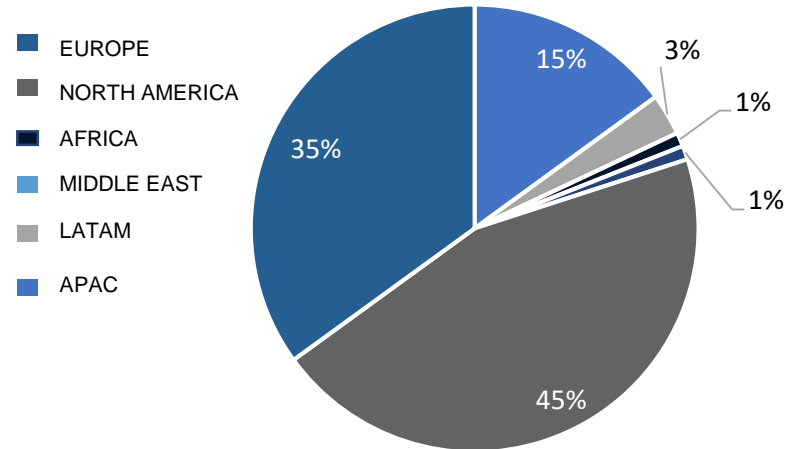
Sources: ESOMAR



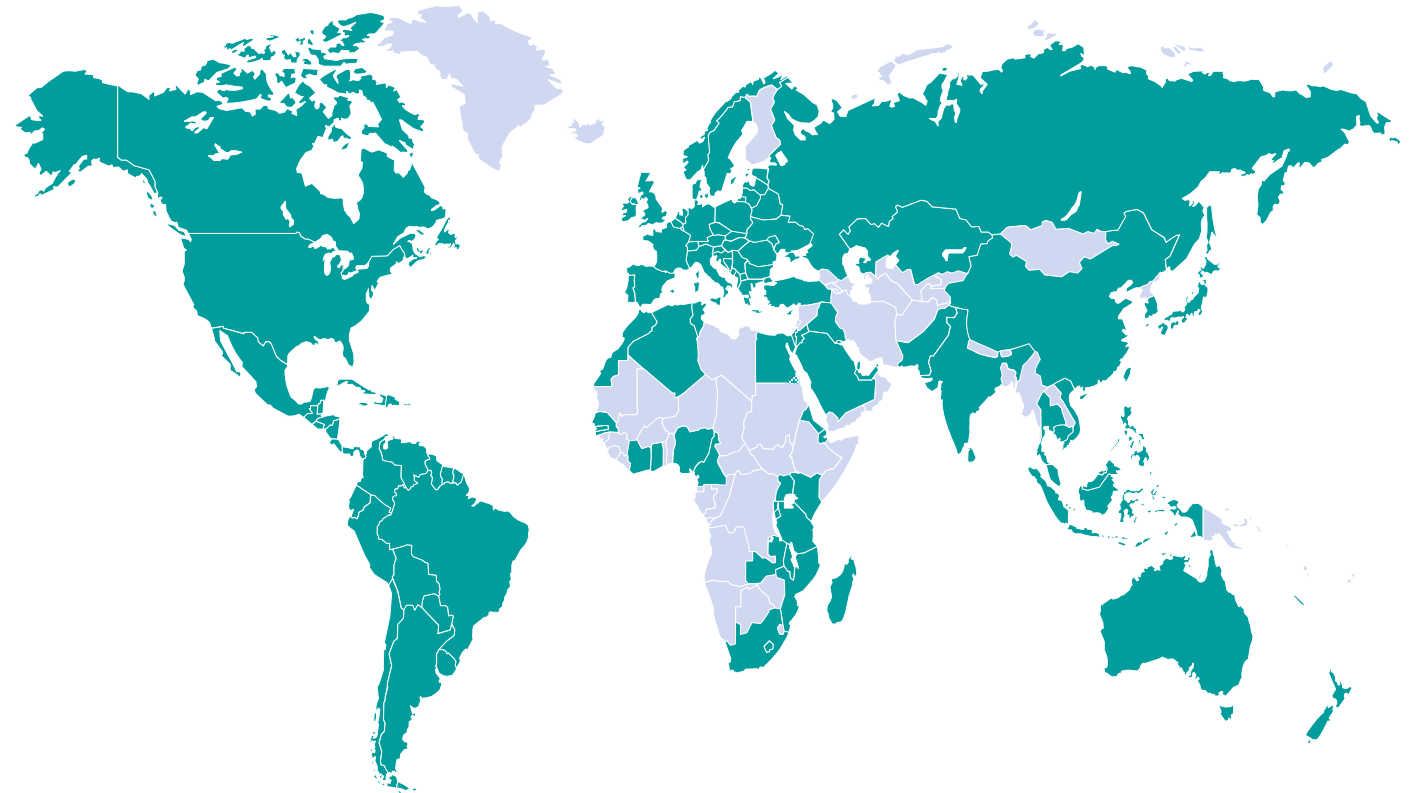
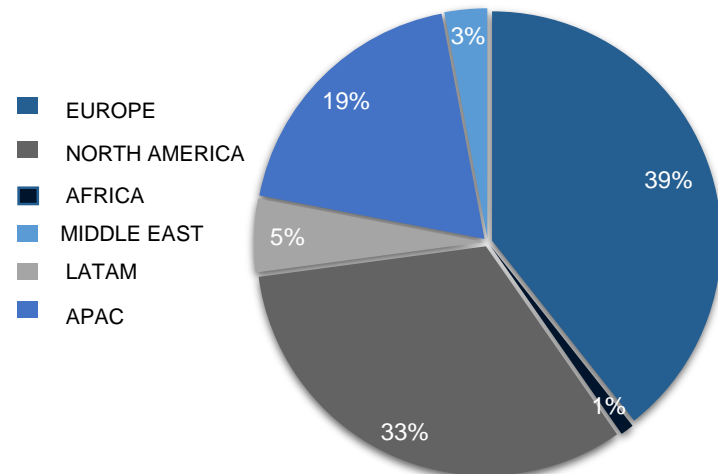


# GLOBAL POSITIONING WITH STRONG LOCAL FOOTPRINT IN 90 MARKETS AND 200 CITIES

Global Market Research turnover 2018



Q3 2019 Revenue by region



- **Offering worldwide coverage for its customers**
- **Pursuing efficient and profitable growth opportunities in all markets**

# A GROWING PORTFOLIO OF NEW SERVICES

## OFFERING CLIENT SUPPORT BASED SERVICES

Workshops, Advisory services,  
Insight Cloud, Market Entry  
Research / Business consulting

## HAVE THE DATA IN REAL TIME

Digital Platform  
Mobile, Overnight Services,  
Enterprise Feedback  
Management (EFM),

## IPSOS.DIGITAL PLATFORM

“DO IT YOURSELF” online tools  
enabling clients to carry out their  
studies by themselves

## ANALYSING BIG DATA

Data analytics / Data  
Science, Ipsos Science  
Center, Path to Purchase

## MEASURE DIFFERENTLY

Social Media Research & Insight,  
Behavioural Economics,  
Ethnography, Neurosciences,  
Consumer & Retail Audit,  
Mediacell, Virtual /  
augmented reality & 360 Video,  
Simstore

## SOCIAL INTELLIGENCE & ANALYTICS

An enhanced range of services in 2019 built  
on combining Ipsos’ methodological know-  
how and Synthesio’s data collection  
expertise.



# TODAY'S AGENDA

## BUILDING ON SUCCESS



**Didier Truchot**  
Chairman & CEO

## FINANCIAL OUTLOOK



**Laurence Stoclet**  
Deputy CEO & Group CFO

## FOCUS

**Our DIY solution: Ipsos.Digital**, Andrei Postoaca, CEO Ipsos Digital

**Focus on India**, Amit Adarkar, Country Manager, India and APEC Operations Director

**When Social Media Intelligence meets Next-Generation AI**, Leendert de Voogd, Global Service Line Leader Social Intelligence Analytics & Loïc Mosand, CEO Synthesio

**Creating the next generation of public affairs research**, Darrell Bricker, Global CEO, Ipsos Public Affairs

**Ipsos Foundation**, Marie-Christine Bardon, President Ipsos Foundation

**Brexit Britain**, Kelly Beaver, Country Service Line Group Leader, Public Affairs Corporate

# THANK YOU

GAME CHANGERS





# FINANCIAL OVERVIEW

# 2

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Laurence STOCLET  
Ipsos Deputy CEO & Group CFO

# AGENDA

Growth by region

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Growth by audience segment

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Growth in New Services

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Delivering shareholders value

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2019-2021 outlook

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# GROWTH BY REGION – YTD SEPT

In € millions	Q3 2019	Contribution	Total YoY growth	Organic growth
EMEA	607.4	43%	13.5%	1%
Americas	529.3	38%	20.1%	3%
Asia-Pacific	266.0	19%	11.8%	7%
<b>First-half revenue</b>	<b>1,402.7</b>	<b>100%</b>	<b>15.5%</b>	<b>3.0%</b>

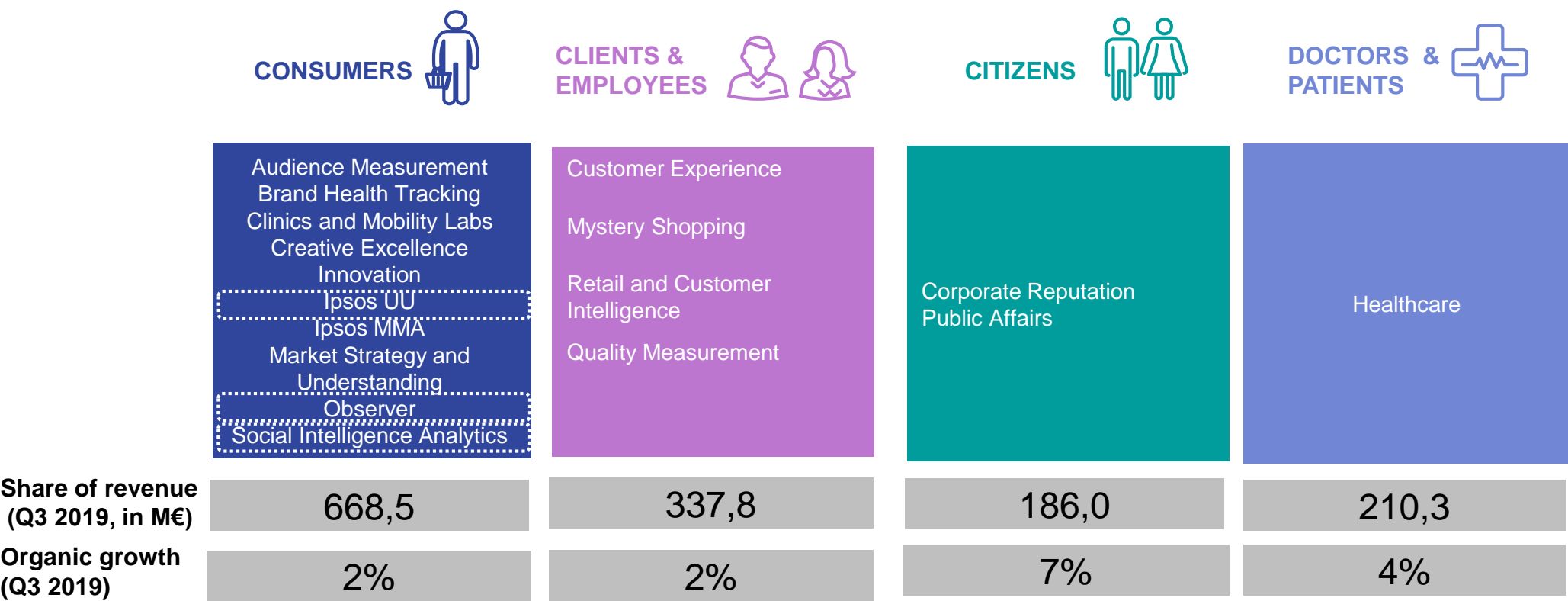
* Of which	Contribution	Organic growth
Developed countries	69%	2.2%
Developing countries	31%	4.6%



# BE CLOSER TO CLIENTS' NEEDS TO CAPTURE GROWTH

Increased market share

- Through more tailored services
- Through a multiplication of touchpoints and cross-selling within the client



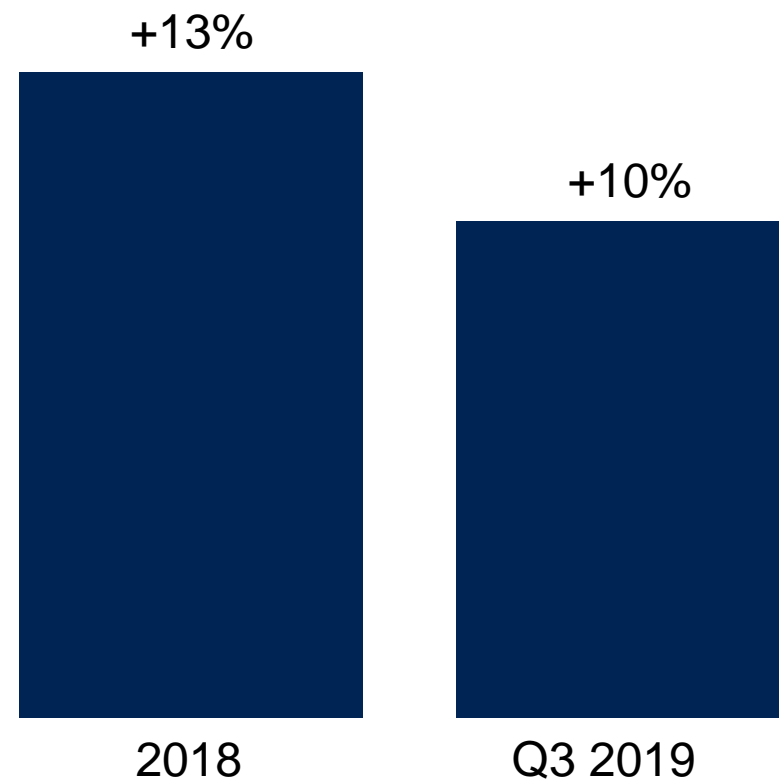
Transversal capabilities

# GROWTH IN NEW SERVICES

## 4 categories of new services Share of revenue

	<u>2014</u>	<u>2019</u>
Measure differently	2.7%	3.8%
Have the data in real time	2.2%	4.2%
Analyse Big Data	1.6%	3.7%
Offer expert advisory services	0.9%	3.1%
	<hr/> 7%	<hr/> 15%

## Growth rate of revenue (on a constant basis)



# HISTORICAL EPS & DIVIDEND DATA SHOW SOLID GROWTH

<i>(in million euros, except per share data)</i>	FY15	FY16	FY17	FY18
Net Profit - Group share	93,0	106,9	128,5	107,5
Adjusted Net Profit - Group share*	126,5	121,7	127,4	125,2
EPS (basic)	2,05	2,40	3,00	2,48
EPS (fully diluted)	2,03	2,36	2,95	2,40
Adjusted EPS (basic)*	2,80	2,73	2,98	2,88
Adjusted EPS (diluted)*	2,76	2,69	2,93	2,80
<i>nb shares for calculating basic EPS (k shares)**</i>	45 273	44 626	42 791	43 441
<i>nb shares for calculating diluted EPS (k shares)**</i>	45 793	45 302	43 530	44 772
Dividend per share	0,80	0,85	0,87	0,88
Dividend payout	28,5%	31,1%	29,4%	30,6%

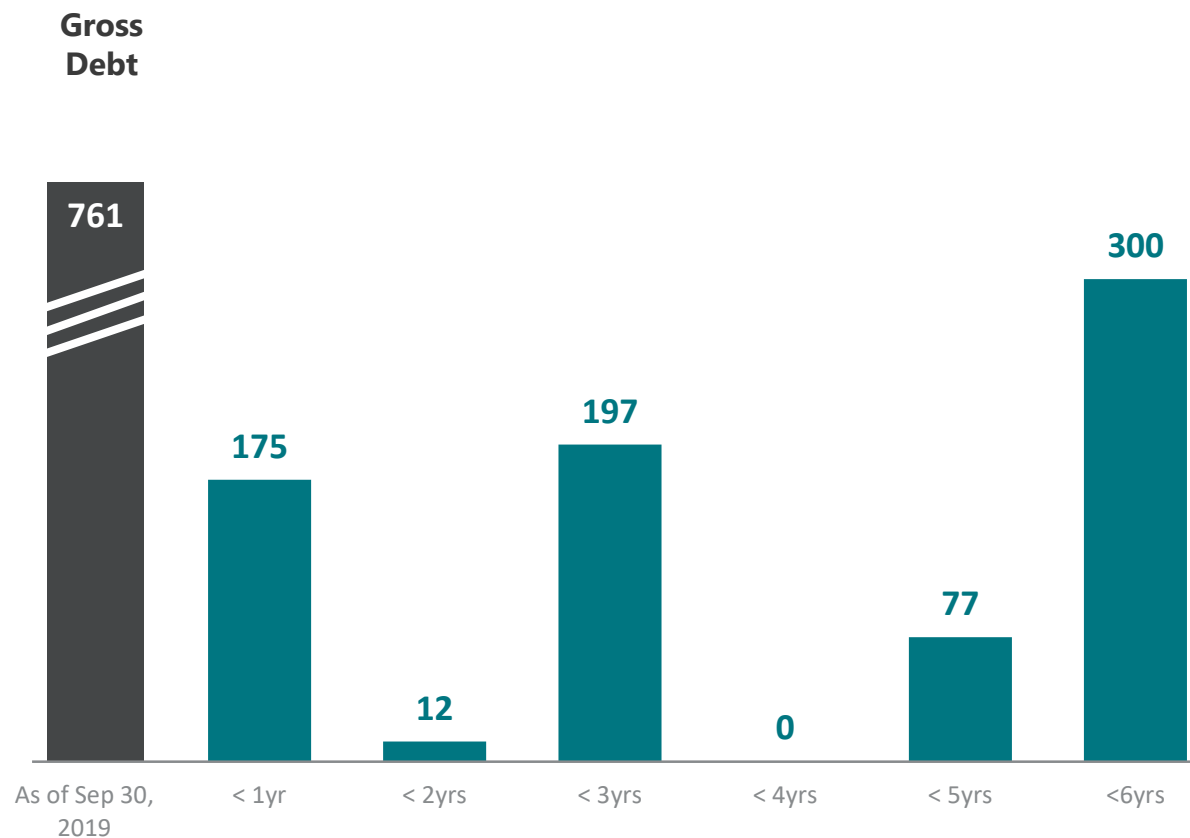
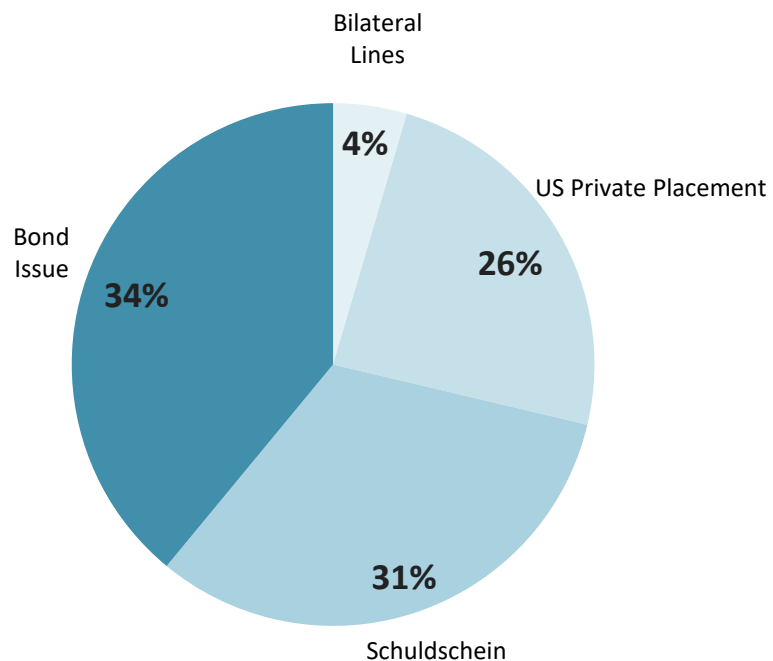
\* Adjusted net profit is calculated before non-cash items linked to IFRS 2 (share-based payments), amortisation of acquisition-related intangible assets (client relationships), deferred tax liabilities related to goodwill on which amortisation is tax-deductible in certain countries and the impact net of tax of other non-recurring income and expenses.

\*\* Updated number of shares for the following periods: FY17, 1H17 and 1H18



# A LONG TERM DEBT PROFILE

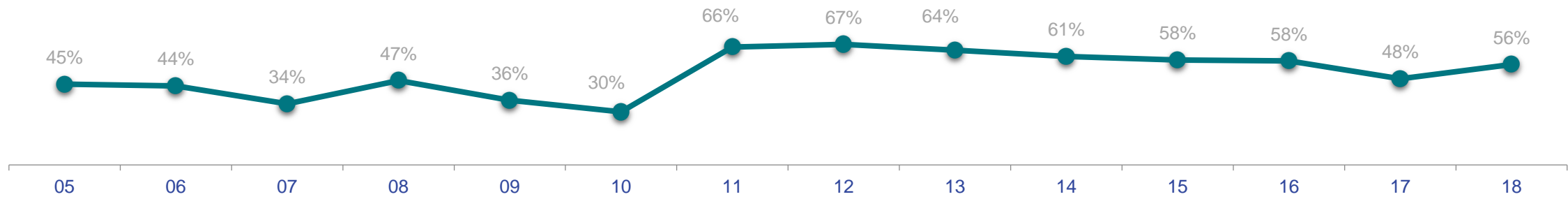
## SPLIT BY DEBT TYPE



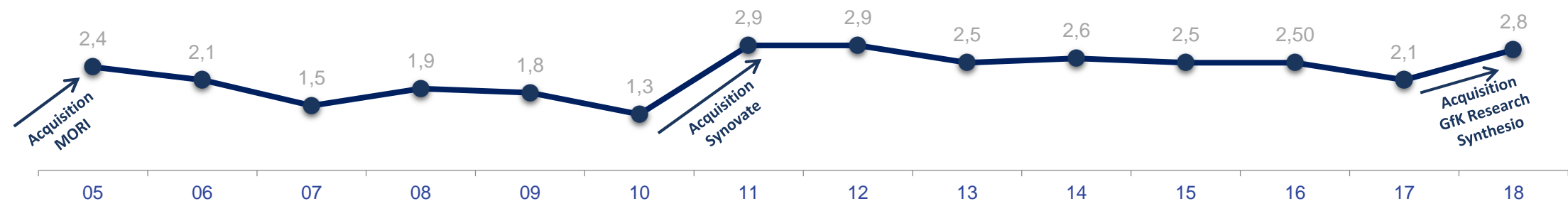
As of Sep 30, 2019, Ipsos has also unused credit facilities of over €500m.

# DELEVERAGING CAPACITY

## Gearing

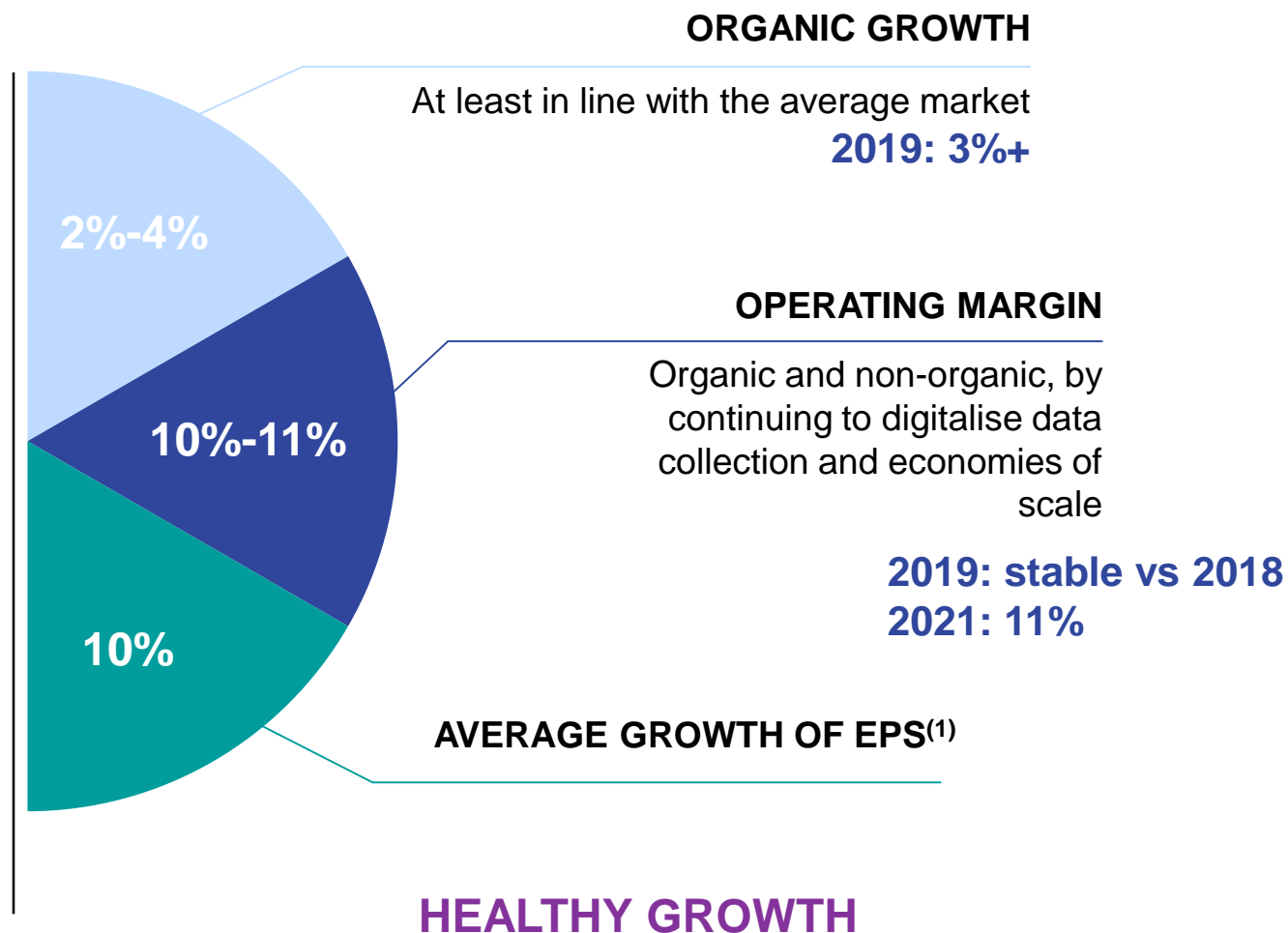
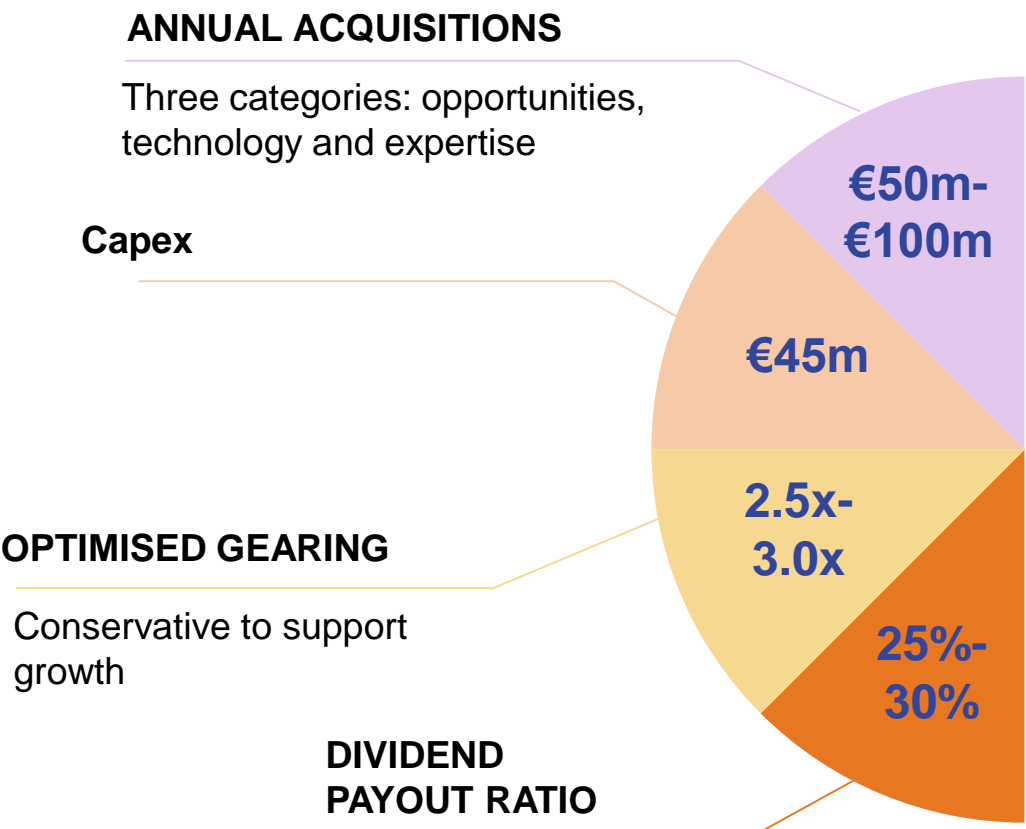


## Leverage



# 2019-2021

## BALANCED ALLOCATION OF CASH



(1) Based on diluted EPS at constant exchange rates



# THANK YOU

GAME CHANGERS




# OUR DIY SOLUTION

Andrei POSTOACA, CEO Ipsos Digital

GAME CHANGERS







The DIY market is a  
**1.5 BILLION**  
INDUSTRY



# DIY IS A FRAGMENTED MARKET...





## OUR PURPOSE

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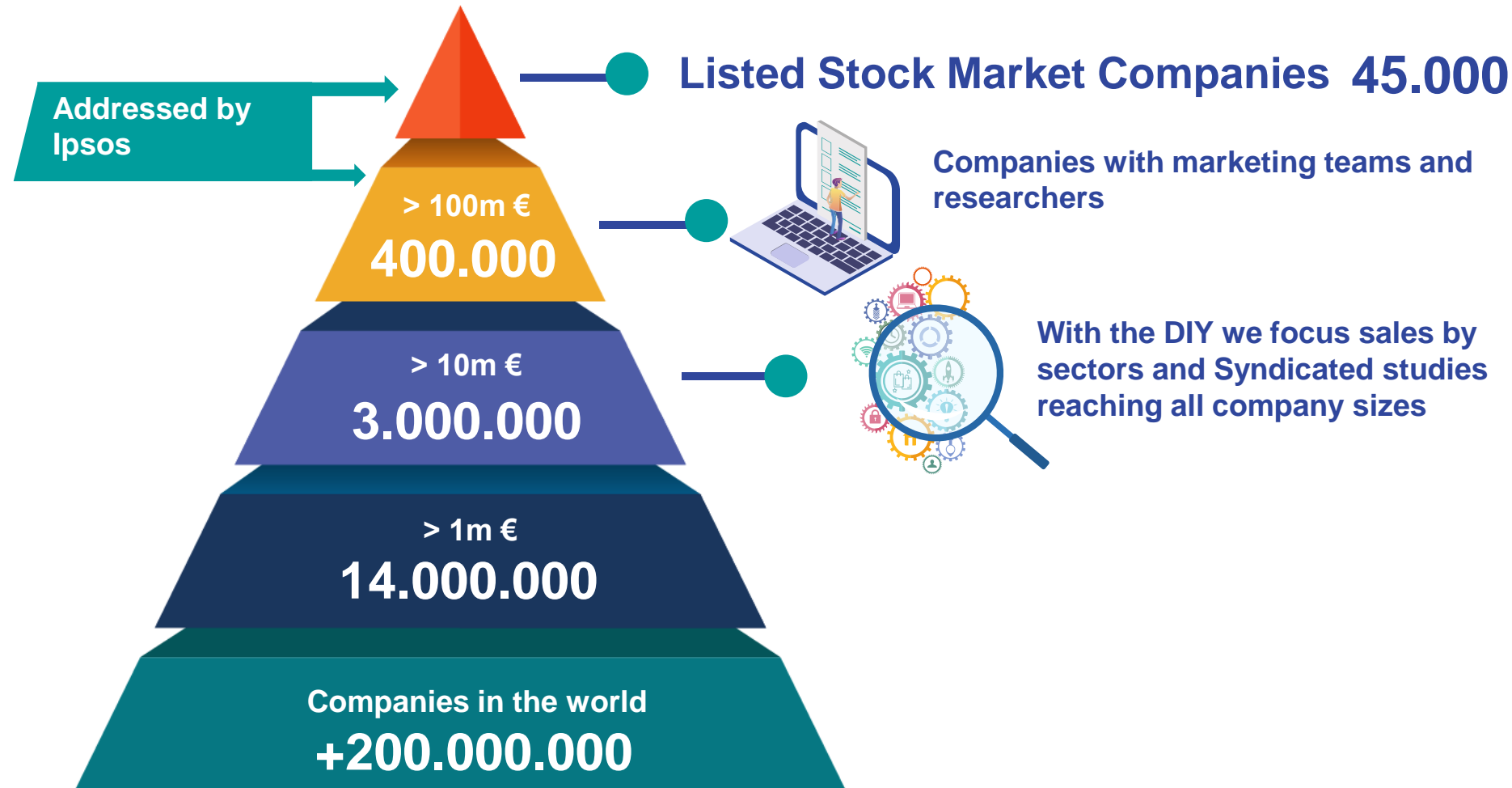
**Allow clients and Ipsos  
research teams  
to build their own surveys**

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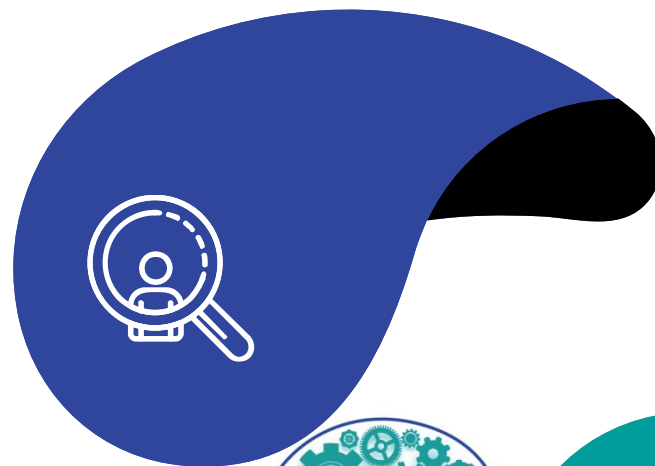
# REACHING LONG TAIL OPPORTUNITIES OF THE MARKET RESEARCH



GROWTH POTENTIAL INTO THE SME SECTOR – A VIEW OF COMPANIES IN THE WORLD\*



# WHAT MAKES US UNIQUE?



## RESEARCHERS

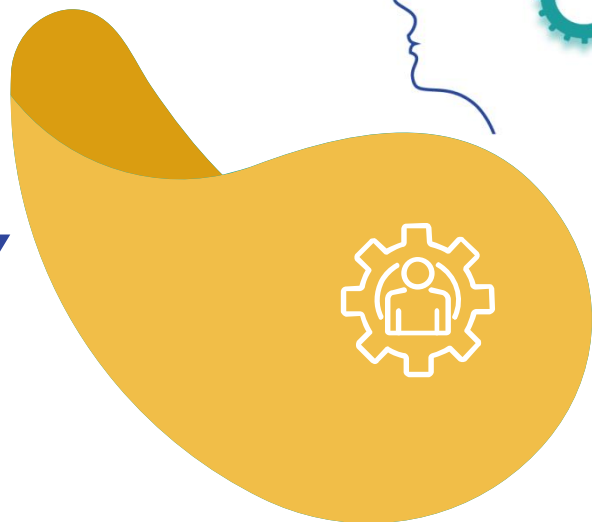


Offer access to Ipsos experienced, specialised and global reach of researchers.



## TECHNOLOGY

End-to-end, intuitive application. Define the sample, build the questionnaire, launch the study and see automatically produced reports (dashboard, ppt, pdf and cross tabulation tool)



## RESPONDENTS



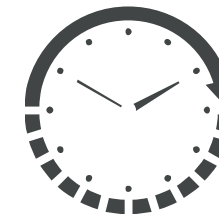
The art of managing panels. Access to Ipsos' worldwide network of online respondents. High quality and targeted.



# SPEED AND AGILITY

GET ANSWERS TO YOUR QUESTIONS WITHIN 24 HRS. IN 4 SIMPLE STEPS

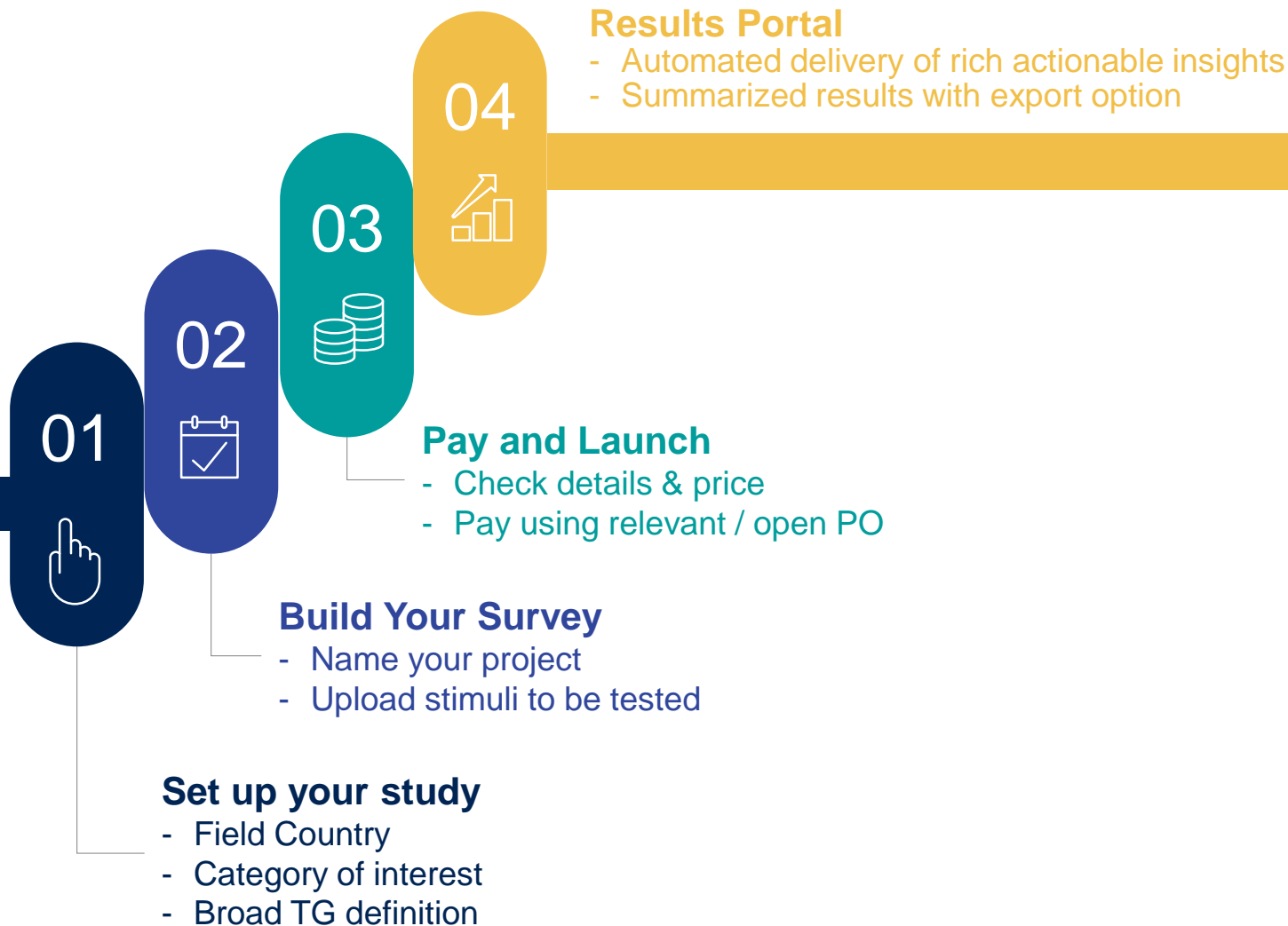
*\*For incidence > 50% and sample < 500*



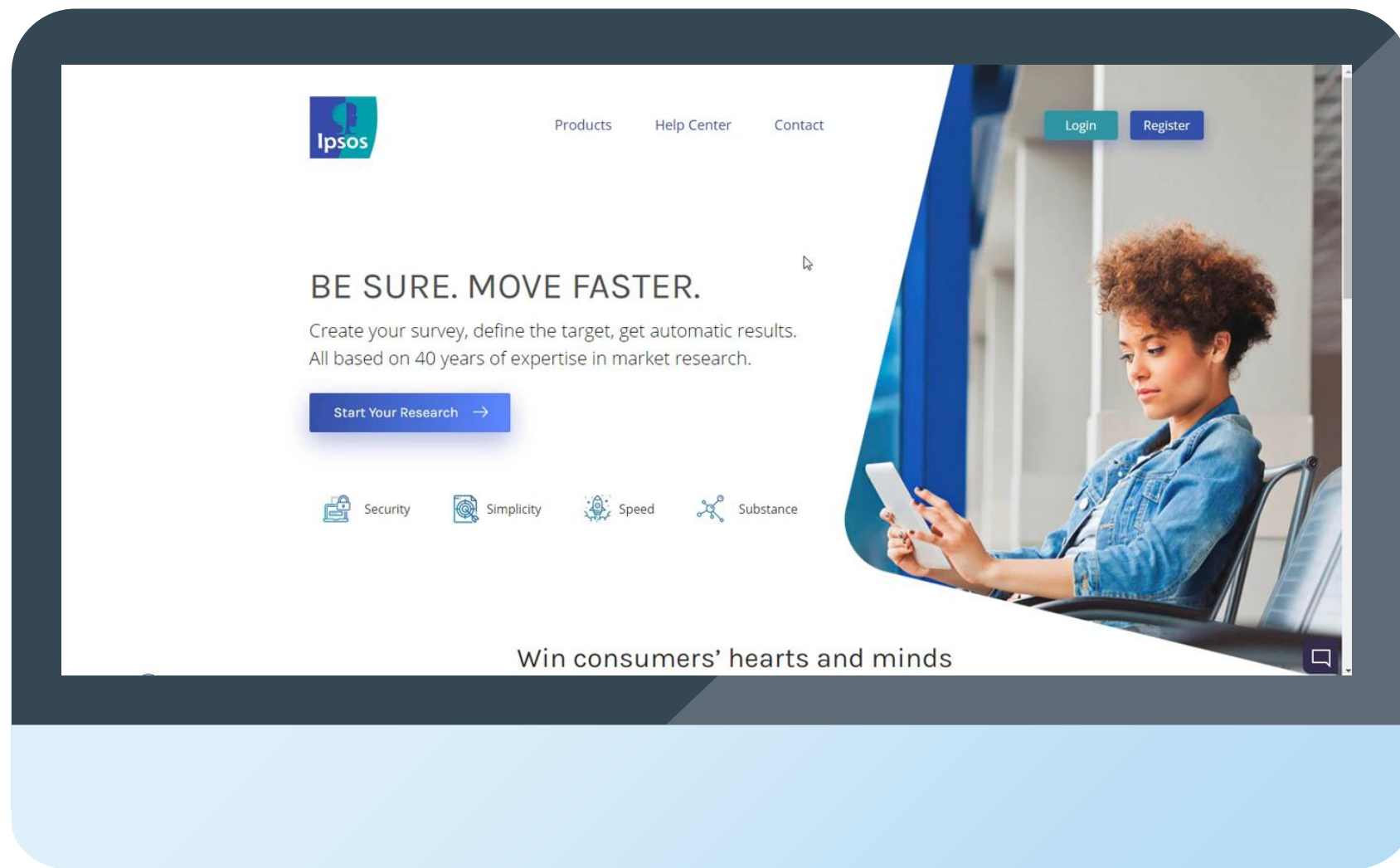
*Within  
24 hours*



*Within  
1 hour*



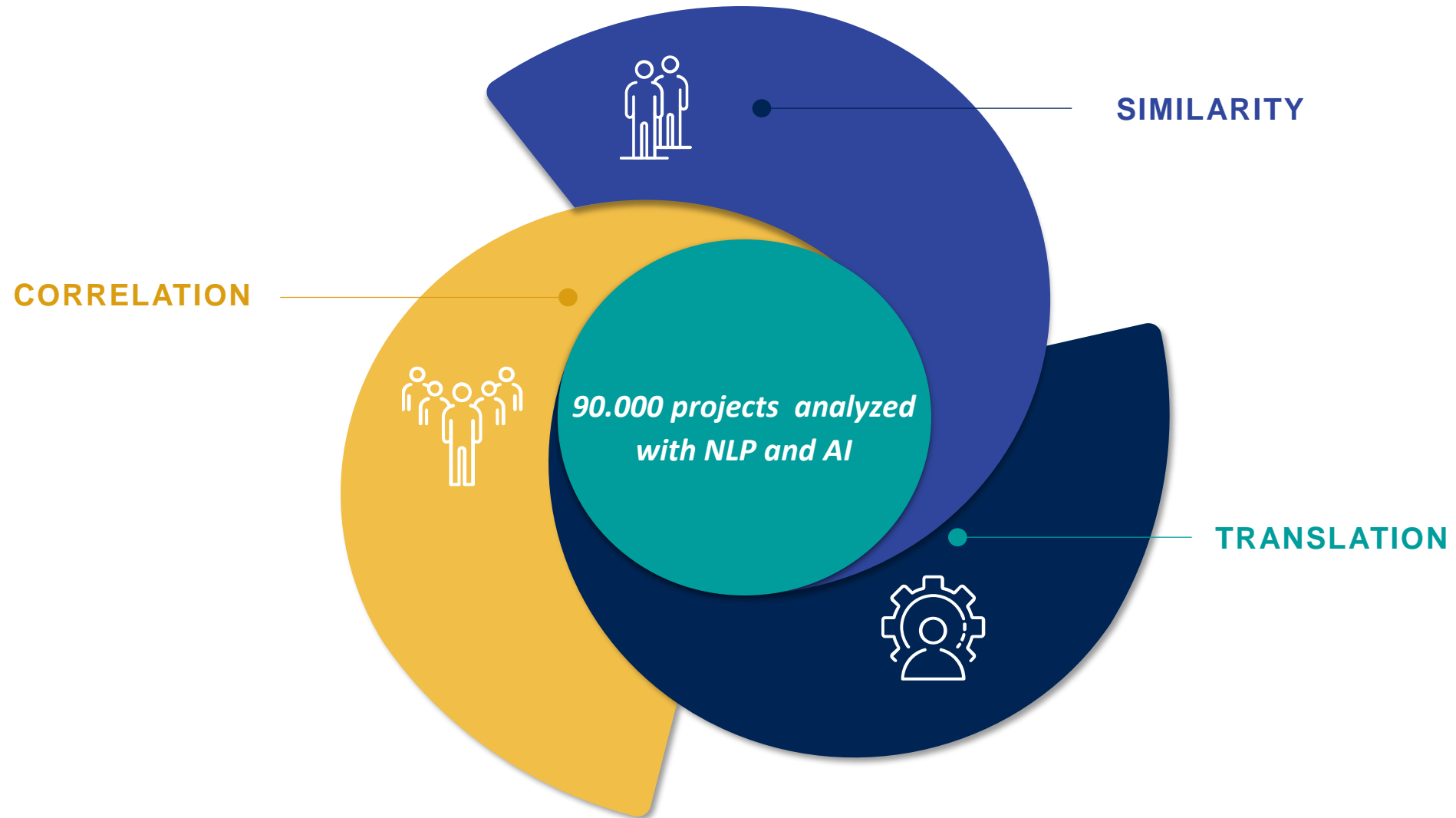
# SIMPLICITY



# SUBSTANCE



# QUESTION LIBRARY







## Build Your Survey

What do you want to call the project? i

i SURVEY QUESTIONS

↔ SURVEY LOGIC

### Target Description:

Your study will be conducted among Pet Owners (dog, cat, fish, bird or other pets), both males and females aged 18-65

How likely are you to buy coffee in the next 24 hours?

- ☐ I will for sure buy coffee in the next 24 hours
- ☐ I think I will buy coffee in the next 24 hours
- ☐ I don't think I will but coffee in the next 24 hours
- ☐ I will for sure not buy coffee in the next 24 hours

[+ Add new question](#)

[← Previous Step](#)

[🔗 Test your survey](#)

[Order →](#)

## Questions Library

Drag and drop questions from the library into your questionnaire.



All questions



[Edit suggestions criteria](#)

Screening

Purchase Intention

Usage & Attitude

Brand Awareness

Demographic

No correlation questions

What state do you live?

Do you like drinking coffee?

When did you last buy coffee?

Do you like drinking coffee at the bar?

Do you usually buy luxury coffee?

[+ Purchase Intention \(15\)](#)

[3 correlation questions](#)

If you could change just one thing about our product, what would it be?



What's the frequency with which you purchased luxury beer?



What's wrong with purchasing luxury coffee?



Is buying luxury coffee a better choice?

Is buying luxury coffee generally benefiting the consumer?

When do you like to shop for coffee?

How would you describe yourself as a coffee drinker?

[Can't find a question?](#)

☐ Show only correlation questions



# PRODUCTS

## Fast Facts



Build your own  
questionnaire and  
launch it

## Claims Testing



Screening claims,  
attributes or short  
statements

## Varieties Testing



Screening flavours,  
fragrances or  
varieties

## Names Testing



Screening brand  
names or  
descriptions

## Visuals Testing



Screening visuals,  
icons or logos

## Soon: Creative |Spark



Copy Testing

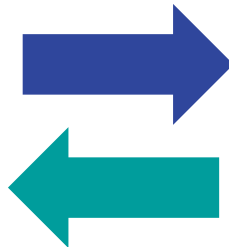
## Soon: InnoTest



Idea and Concept  
Testing

# COLLABORATION

## START IN THE DIY



### COLLABORATION TOOL

- Task Management
- Booking Management
- Chat

Get a **Researcher** to help



Have a **Script Writer** finalizing the questionnaire and the survey logic and back to the researcher for analysis

# PANELS

ACCESS TO HIGH QUALITY RESPONDENTS GLOBALLY



**Fully integrated  
access to  
respondents.**



**700 predefined sample  
templates**



**Ability to build your  
sample**

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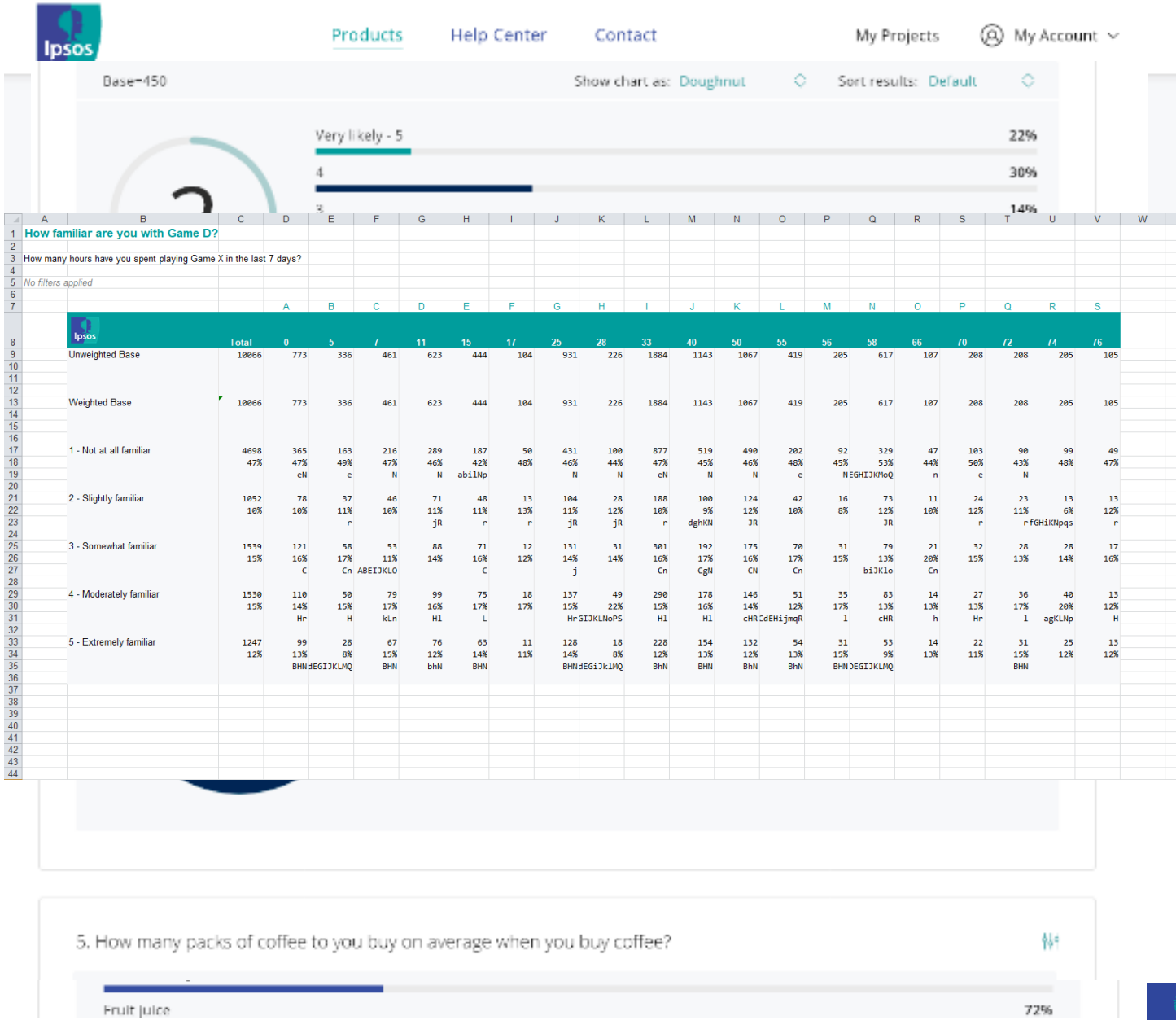




# REPORTING

## INSTANT VISUALIZATION OF THE RESULTS

Offering an automatic and integrated dashboard, native ppt, pdf and a cross tabulation tool for the clients who want to dig deeper in the data themselves.

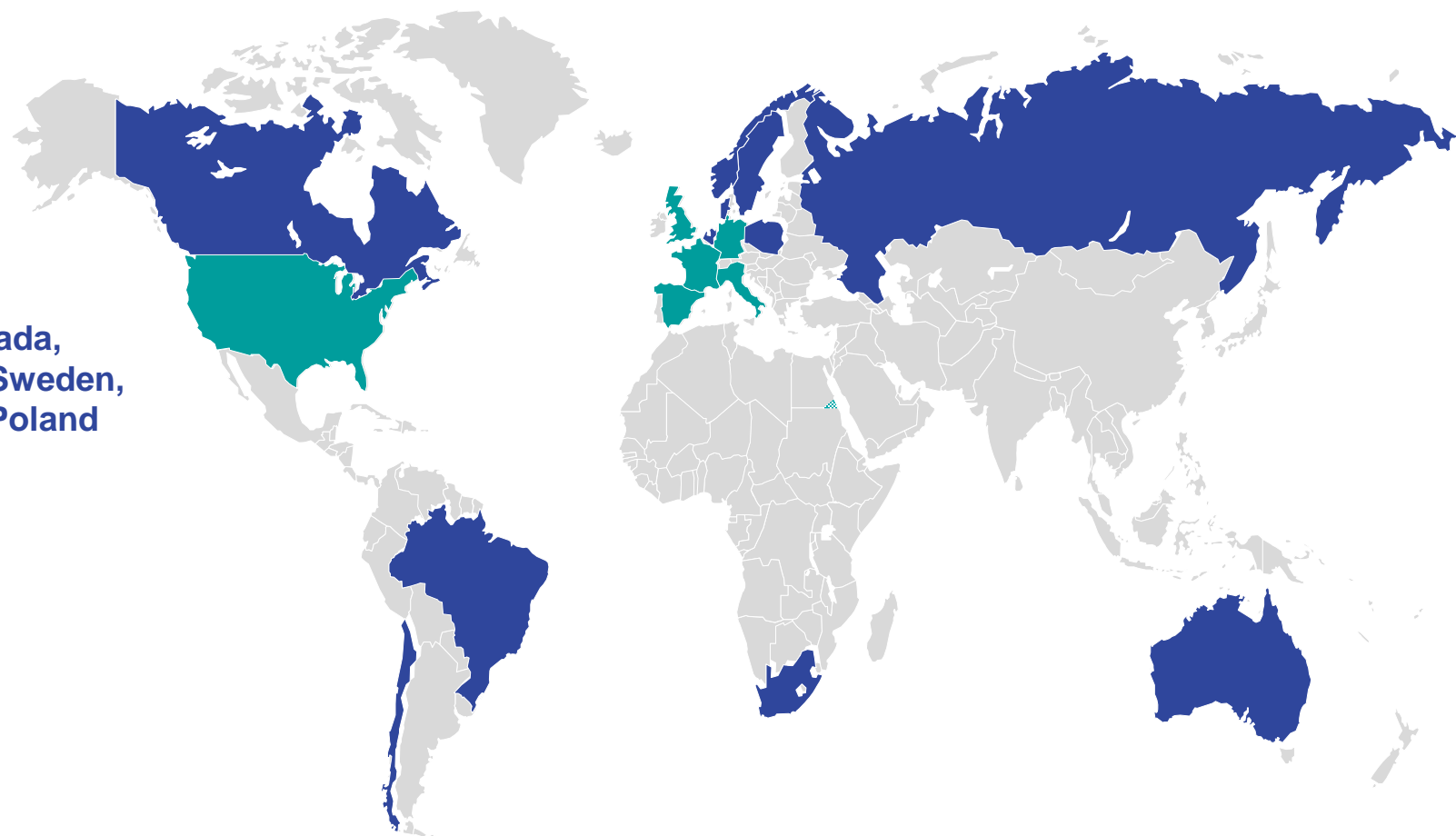


# EFFICIENCY - COMPARISON



# GLOBAL REACH

- 2019** ○ Currently in US, UK, France, Germany, Italy and Spain
- JAN 2020** ○ Australia, Brazil, Chile, Canada, Netherlands, South Africa, Sweden, Denmark, Norway, Russia, Poland
- DEC 2020** ○ 60 countries





# WHAT WILL 2020 HOLD?



**Country expansion to  
60 countries**



**New products**



**Expand with  
Service Lines to  
existing clients  
and attract new  
clients**



**Strong focus on  
COLLABORATION**

# THANK YOU

GAME CHANGERS



# FOCUS ON INDIA

A hand is shown reaching out from the bottom left towards a wireframe globe. The globe is composed of a network of white dots connected by thin white lines, creating a mesh-like structure. The globe is centered on the Indian subcontinent. The background is a dark blue gradient with a subtle pattern of white dots and lines, suggesting a global network or digital connectivity. A semi-transparent teal rectangle is overlaid on the left side of the image, containing the text 'FOCUS ON INDIA' and the name 'Amit ADARKAR CEO, India'.

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Amit ADARKAR  
CEO, India

# INDIA AT A GLANCE

POPULATION

1.3bn

MEDIAN AGE

28 yrs

STATES

29

AMBITION

US\$ 5tn





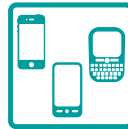
# A GROWING RESEARCH MARKET

MARKET SIZE

**334M US\$**  
**7% GROWTH**



A rich pool of highly  
skilled researchers



Mobile is transforming the way market  
research is done



# IPSOS, A RECENT AND DYNAMIC ENTRANT

INDUSTRY RANK

3

SHARE

9%

MARKET LEADER

**Innovation, Car Clinics**

TOTAL EMPLOYEES

736

LOCAL TEAM: 527

GLOBAL TEAM: 209



# IPSOS OUTPERFORMS THE MARKET

Consistently  
growing  
**2X-3X**

as compared to  
industry

**Biggest growth  
driver  
of APEC**

**Doubled** our business  
over last **5 years**  
CAGR of 14%

One of the  
**fast growing**  
countries globally



# KEY SUCCESS FACTORS

We have capabilities to act **globally & locally**

Focused targeting of **Clients and geographies** for Win

Best in Class data quality through **iField**  
(India a lead market)

Understanding society: **Public Affairs launch**

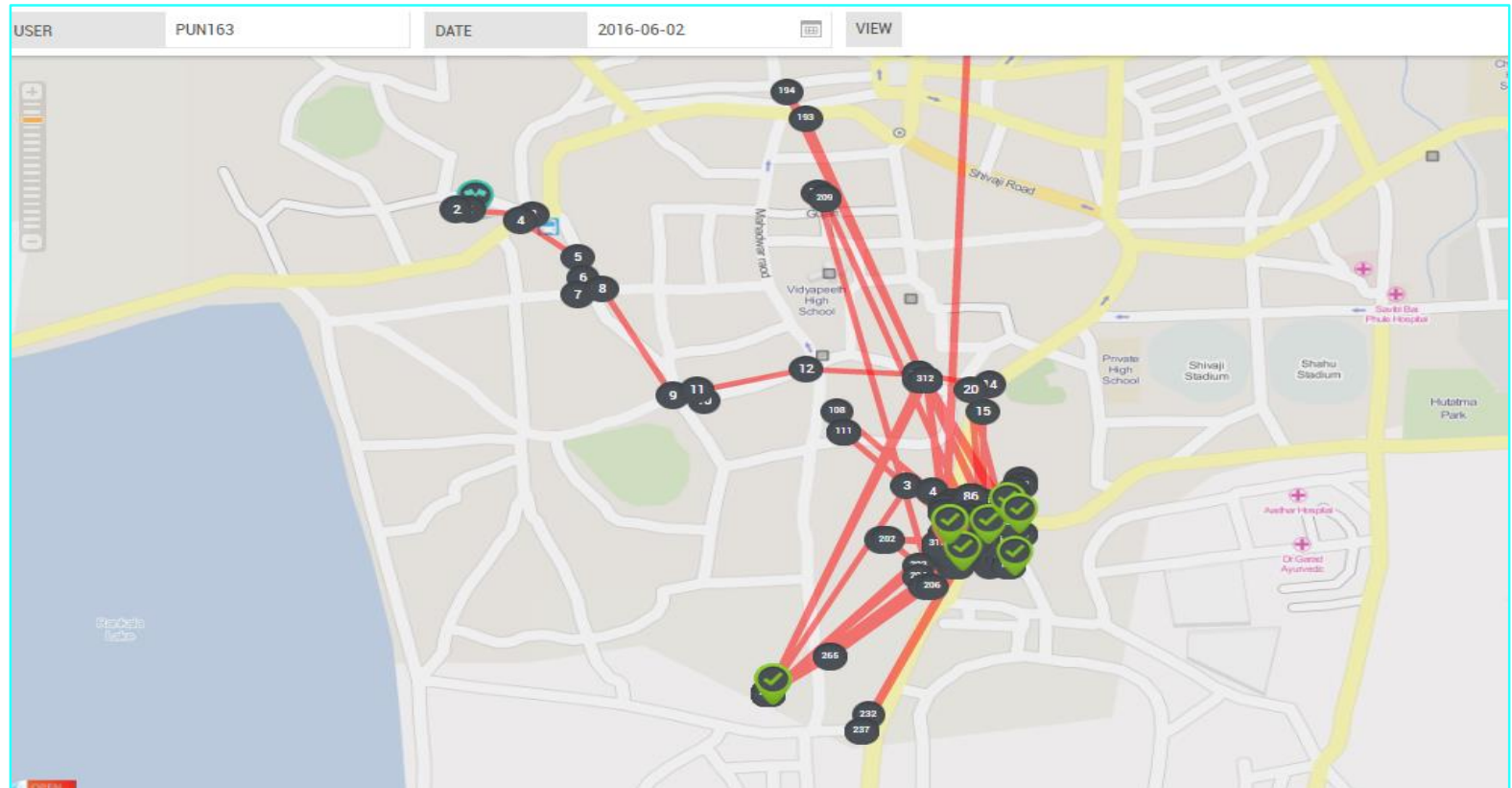


# BEST IN CLASS DATA QUALITY THROUGH IPSOS iFIELD



## ADVANTAGES

- Real time monitoring
- GPS tagging
- Time stamping
- Voice recording
- Centralized monitoring



# LARGEST SANITATION PROJECT IN THE WORLD

## THE PROJECT

Ministry of Drinking Water and Sanitation, Govt of India

Ipsos Commissioned for 2019 and 2020



## COLLECT AND ANALYSE MULTIPLE SOURCES OF DATA



**30 mn +**

Citizen feedback received via mobile APP



**14,236** Religious Places

**5,182** markets / Baazars

**7,792** Health Facilities

**16,569** Anganwadi Centre

**16,680** Government schools



**17,197** Group Meetings with Citizens



**174,121**

Face to face interactions with Key Informants



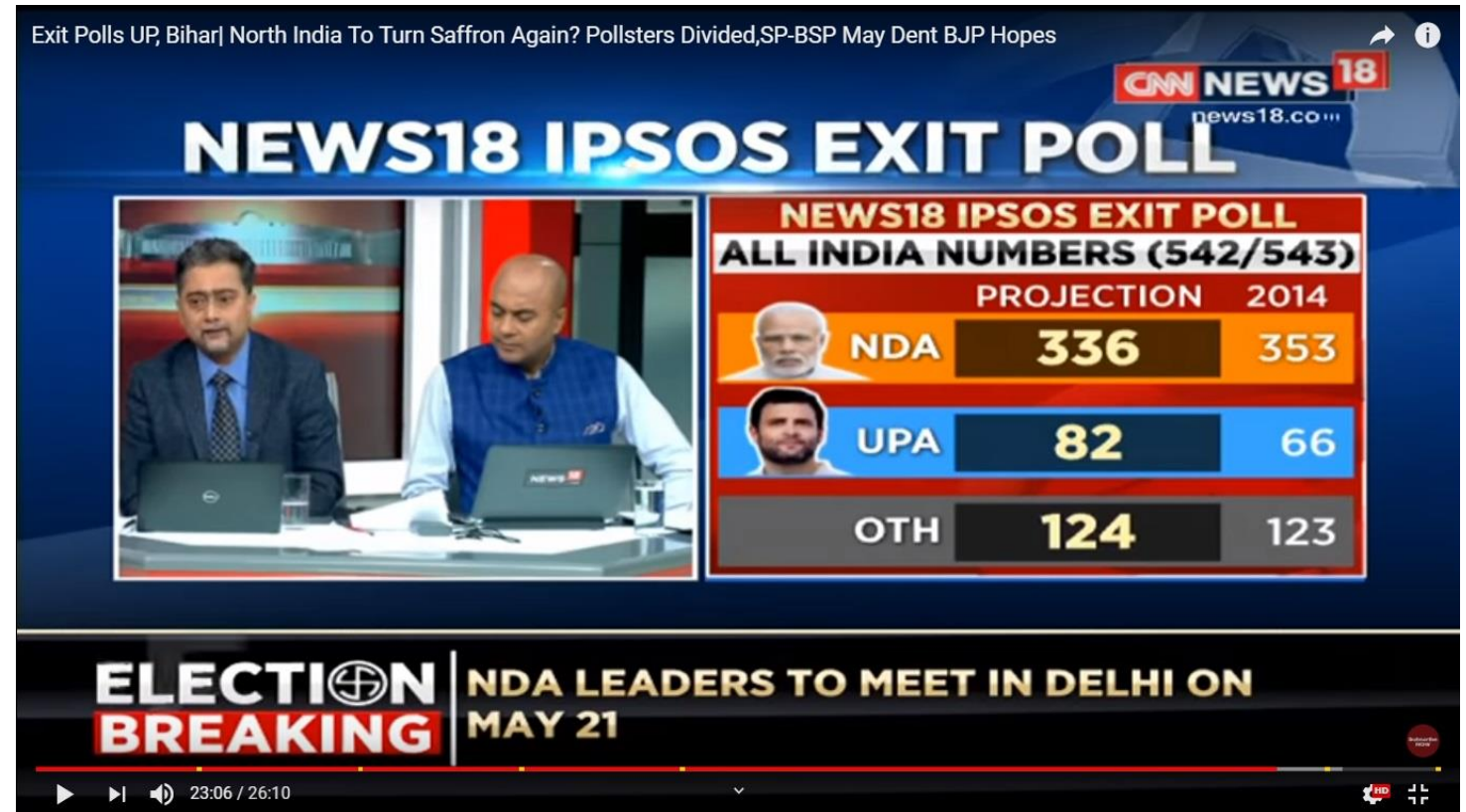
**1.2 mn +**

Citizen feedback received via IVR

# LARGEST EXIT POLL CONDUCTED BY IPSOS

## THE PROJECT

- Largest & most complex exit poll conducted by Ipsos
- 199 parliamentary constituencies, 4776 polling booths
- 136,000 exit interviews over 7 days





# THAT IS NOT ALL

Leveraging India capabilities to support Ipsos globally





# EMPOWERING CLIENTS' GLOBAL RESEARCH PROJECTS

## UNILEVER HIVE

- How do you improve speed and efficiency of innovation?
- How do you raise the bar through value addition?

Centralized end-to-end  
delivery team of 22 for  
running innovation  
projects

Delivered **350+** projects  
every year across  
**30+** countries

Standardisation  
Speed  
Value



# IPSOS MMA: SUPPORTING OUR GLOBAL TEAMS ON HIGH END ANALYTICS WORK

- How is marketing functioning?
- What are the drivers of change in my business?
- How can I optimize the level of investment of each tactic?
- How are my marketing investment strategies performing?
- How does brand perception impact long term performance?

Supports US based Ipsos  
MMA business

High end analytics services  
delivered to Client facing teams

Developers  
Programmers  
Statistics experts

# GLOBAL MIS SUPPORT (MUMBAI) SUPPORTING IPSOS EMPLOYEES

- How do we ensure that employee productive time is not wasted on routine task?
- How do we support global leadership by consolidating financials every month?

Centralized support to  
**18000+** Ipsos employees  
across **90 countries**

Centralized support helps in  
rollout of Global projects like  
TUP roll out, Office 365 and  
creation of MS Teams

Controls and manages  
access management  
**22 people**



Our India team has a bigger ambition to drive Ipsos' profitable growth in the future.

We will further leverage our talent to support Ipsos employees, servicing teams and clients globally.





# THANK YOU

GAME CHANGERS



A hand is shown reaching out from the bottom left, with the index finger pointing towards a wireframe globe. The globe is composed of a network of white dots connected by thin white lines, creating a mesh-like structure. The globe is centered in the background, with the continents of Europe and Africa visible. The background is a dark blue gradient. A semi-transparent teal rectangle is overlaid on the left side of the image, containing the title and speaker information.

# WHEN SOCIAL MEDIA INTELLIGENCE MEETS NEXT-GENERATION AI

Leendert de VOOGD – Global Service Line Leader SIA  
Loic MOISAND – Founder / CEO of Synthesio

OUR OPPORTUNITY HAS  
BECOME EVEN

**BIGGER**

THE ROLE OF SOCIAL  
MEDIA ANALYSIS IS

**MAJOR**



RT @andyolsenukip: Cameron is using greens as an excuse to not to debate with nigel Farage. LITLABCON RUNNING SCALING  
RT @tr3sc: Els @laxnbusto inicien nova gira en format acústic i estrenen el cicle #BorndeCançons @BornCC <http://t.co/v4m8TVzkl>  
THE ANARCHAL RESPONSE

BORN DEAD VEST

\*USEFUL POCKET\*

<https://t.co/vge1QQs08H>

JUSTICE FOR COREY KANOSH - n-eye-meria: Unarmed Paiute indigenous man innocent of all crimes killed by... <http://t.co/02mShntnpl>

@Audrey\_wia hahaha pvt chat aja sini ceritaa,tapi besok aja deng. Udh malem mending bobo. Taekwondo beb--

RT @ThomasWieder: François Lamy (PS) au Monde : le FN n'est pas invité à la marche républicaine de dimanche car il ne  
vise le pays et joue ...

RT @ricoxxsalam: Ehem "@pak\_widiantoro: RT @20Suka: Papa jahat <http://t.co/Fa0YJh7SYD> <http://t.co/Lfr2KLfuek>"

члена арабским методом <http://t.co/Ir80S20739> #члена #методом увеличение

RT @aqueenofmagic: Efemérides y curiosidades de Queen <http://t.co/B08xXo2NWe> vía @aqueenofmagic

RT @jblnews1: لوائح رابغا | لبلجلا ةيرابغا - ةيحملا دهاعملا يچيرخ بتاور ليدعت <http://t.co/gt2car5vNp>

RT @blackfilm: It's a HIT!! Lee Daniels' @EmpireFOX Draws Big Numbers In First Episode With a 3.7 Rating! - <http://t.co/o/9d7vb03FxJ>

They just did a Bobby Womack &gt; Bill Withers &gt; Roberta Flack trifecta on @ kjhk. #nice #lfr #mellow #funk

"amizades como vocês estao depois desses tiros que o Justin ta dando? #askbelieber"eu? to ótima

I've put on so much weight over Christmas and I couldn't give a shit it was so worth it #lovethfatlife

Udaan Episode 125 - 9th January 2015 <http://t.co/PeVzT4Nlss>

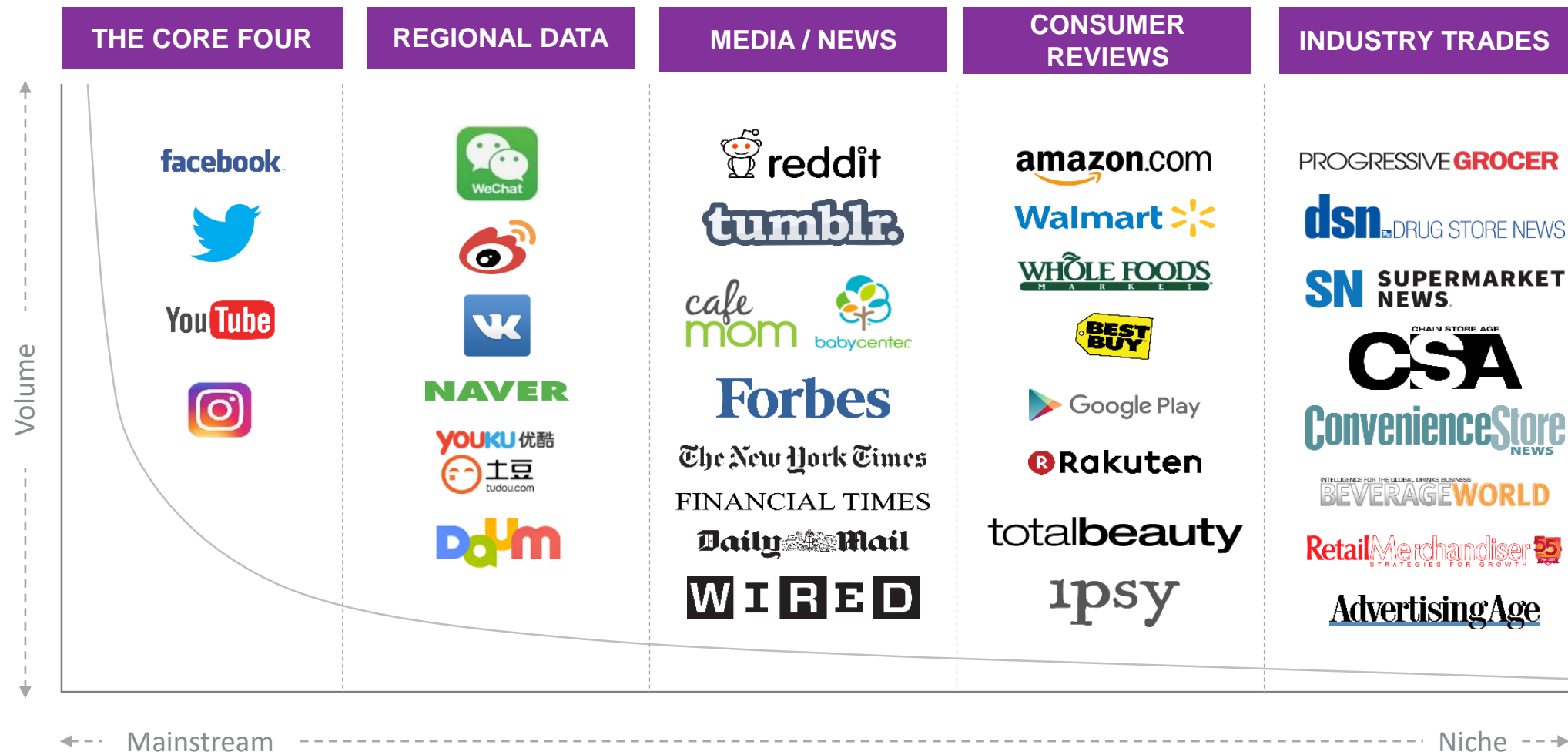
Udaan Episode 125 - 9th January 2015 | Colors TV

... <http://t.co/QDVdZBG5yQ>



# COLLECTING DATA IN REAL-TIME FROM +800M SOURCES!

Offering a wide array of data across all industries and regions and respecting their specific DNA



# DEALING WITH A MULTI-LANGUAGE ENVIRONMENT



# PROCESSING MILLIONS OF UNSTRUCTURED DATA POINTS DAILY

NUMBER OF TEXT MESSAGES /  
POSTS PROCESSED DAILY\*

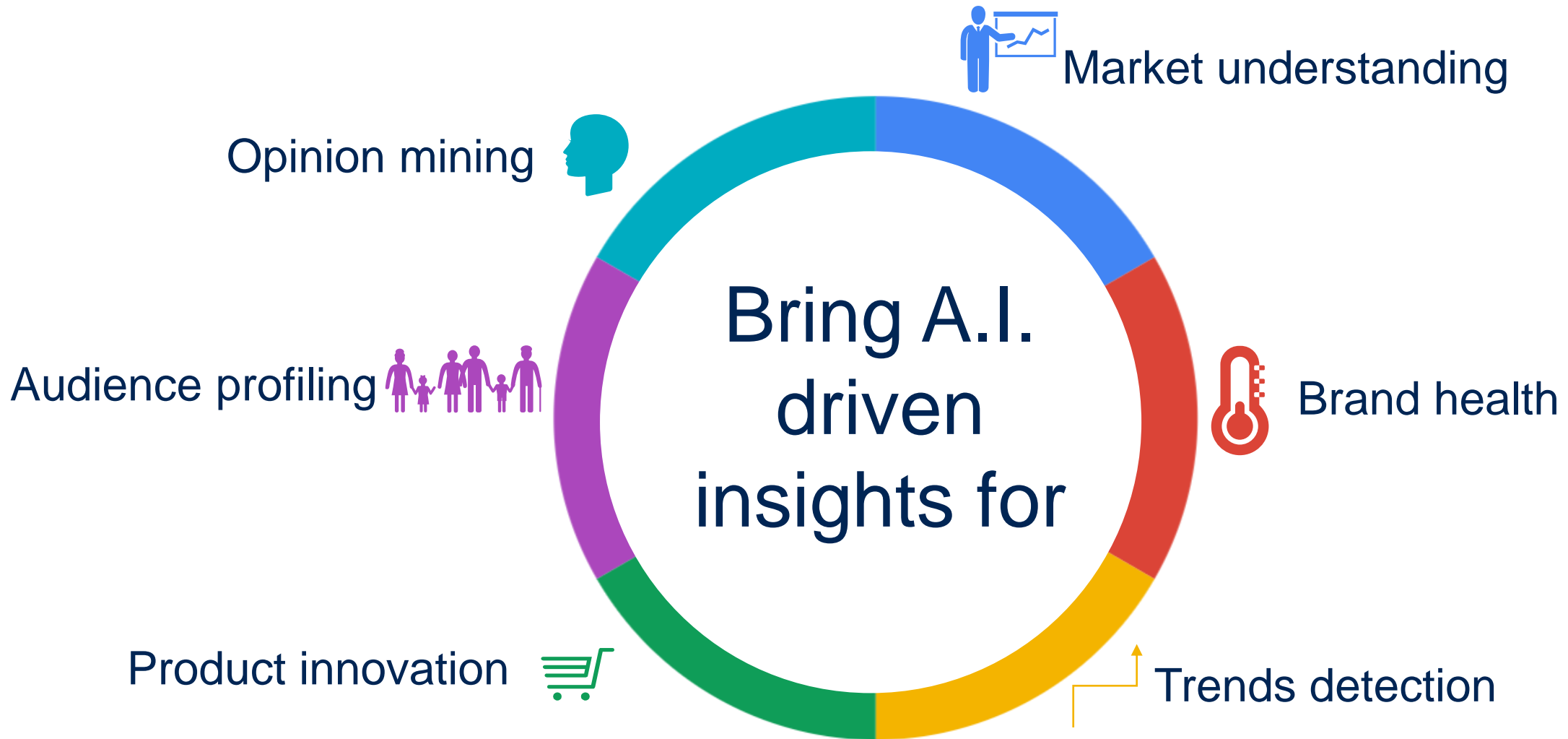
**+60M**

NUMBER OF IMAGES  
PROCESSED DAILY

**+10M**

*\* Number of new text messages or images being processed by the SYNTHESIO platform.*

# A.I. ALGORITHMS TO COPE WITH CLIENTS' NEEDS





# SOME KEY FIGURES FOR TECH DRIVEN INSIGHTS

A DOUBLE DIGIT GROWING SERVICE LINE

SOCIAL MEDIA EXPERTS & DEVELOPERS

220

INCL. DATA SCIENTISTS

25

DATABASE OF DOCUMENTS TO TRAIN A.I. MODELS ON

50 billion

## KEY DRIVERS FOR GROWTH



Technology stack

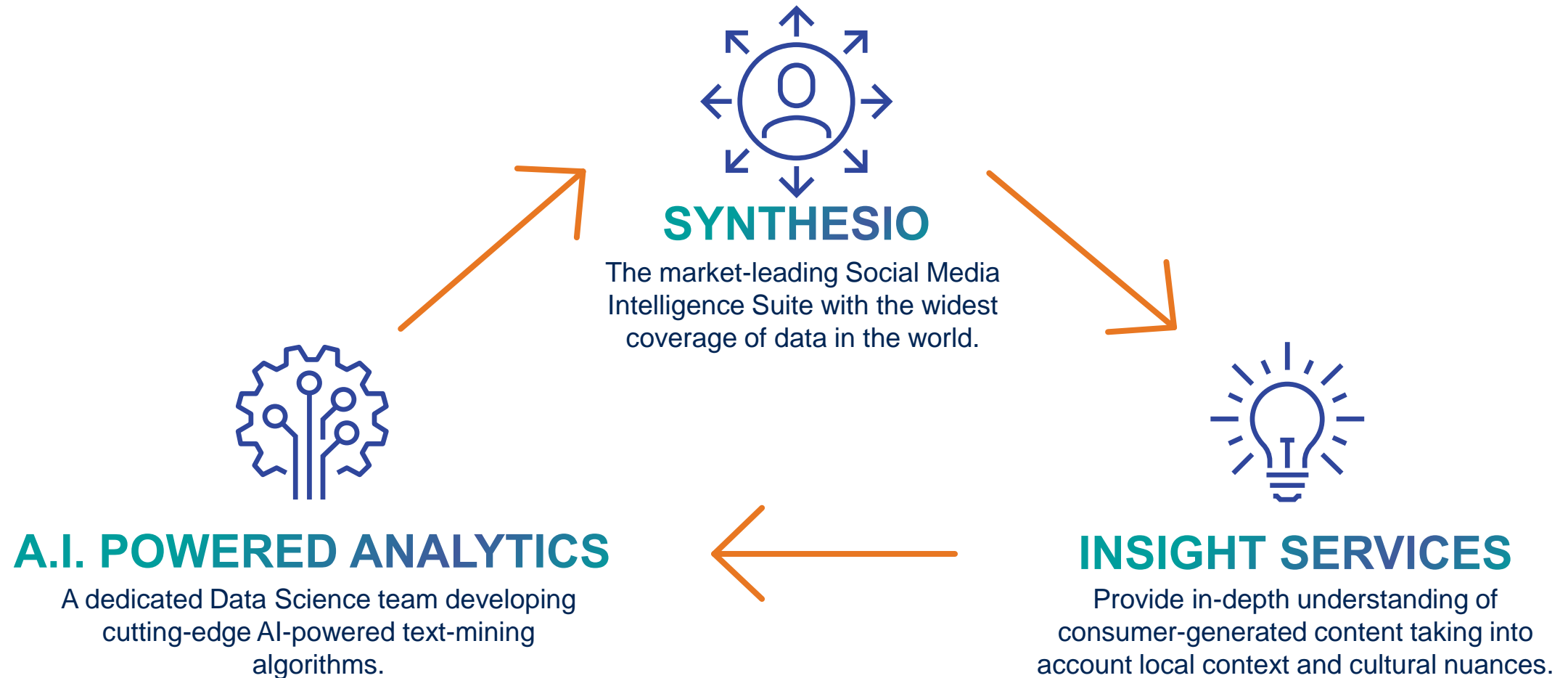


Market research expertise



Innovation / R&D

# A UNIQUE COMBINATION OF SERVICES



# CASE STUDIES

---



# WHICH INGREDIENTS SHOULD I BET ON FOR MY NEW HAIRCARE PRODUCT?

## SOURCES

Social data + Search Data

40 behaviour and ingredient trends in 3 continents.

## METHODS

Benchmarking of trends from social conversations and search signals evolution by their likelihood to grow

## ALGORITHMS

Predictive Modelling  
Sentiment analysis





# IDENTIFYING, MONITORING AND PREDICTING THE EVOLUTION OF TRENDS



Search data



Social media  
Conversations



# CAN ONE OF MY SWEET DRINKS BRAND ENTER HEALTH & WELLNESS SPACE?

## SOURCES

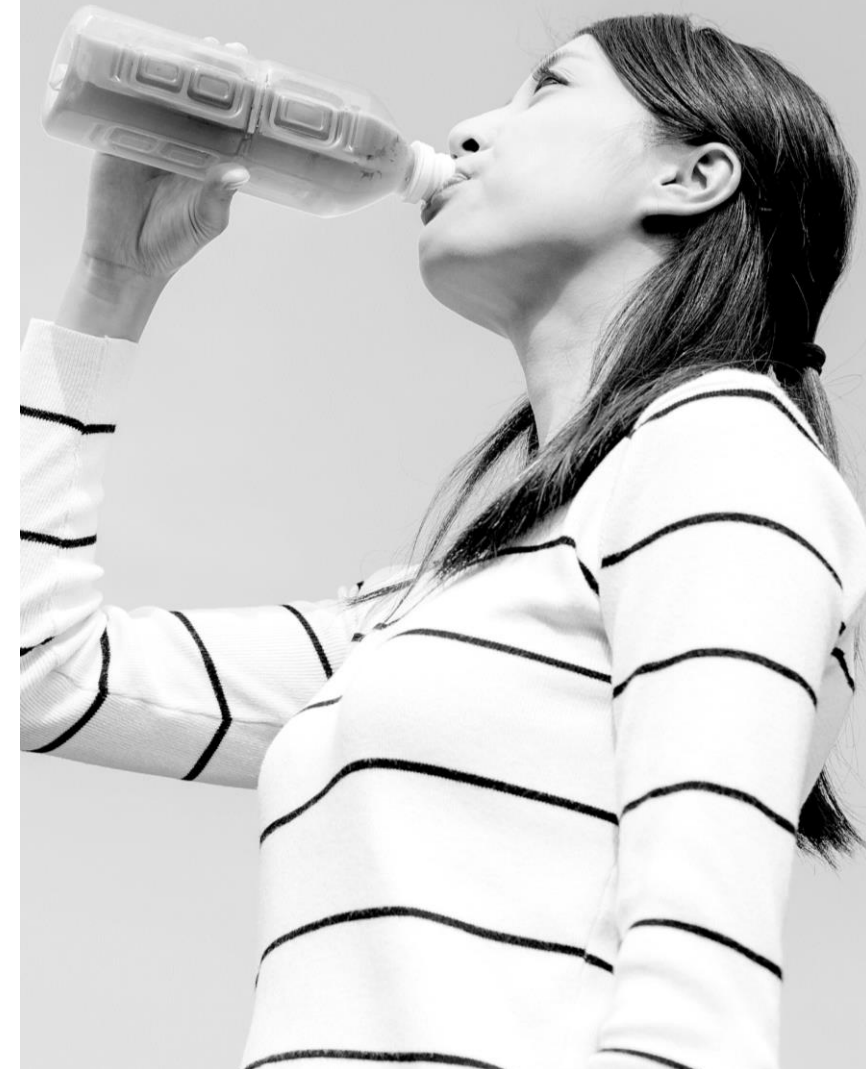
Social data (Facebook, Instagram, Twitter), blogs, forums and comments.  
One year of data and 140,000 conversations analysed.

## METHOD

Examine the brand current position (core attributes and equities in its competitive landscape) and understand category trends.

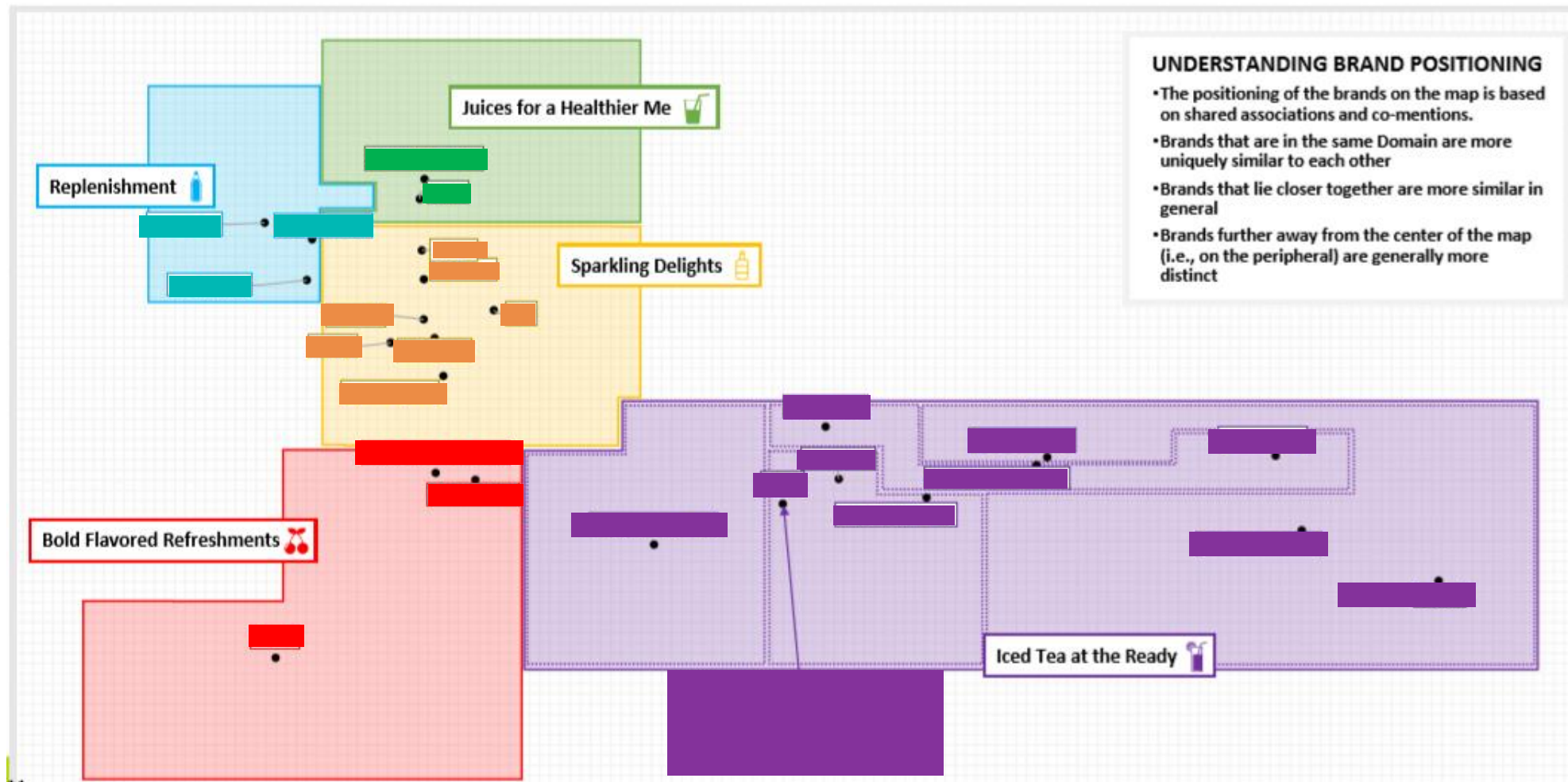
## ALGORITHMS

Named Entity Recognition  
Topic Modelling  
Sentiment analysis



# MAP BRANDS AND CREATE CLUSTERS WITHIN THE MAP BASED ON THOSE BRAND ASSOCIATIONS

**[Redacted]** is positioned alongside accessible and somewhat undistinguished Iced Tea competitors



# BUILDING SYNERGIES BETWEEN SYNTHESIO AND IPSOS DATA SCIENCE

## ENRICH SYNTHESIO OFFER WITH RESEARCH METHODS

Signals AI powered trend detection  
module



## LEVERAGE OUR RESEARCH OFFER WITH SYNTHESIO

An automated reporting technology





## Peaks

Export

Signals tour

Generate Signals

Home

Trends

Context <sup>new</sup>

Peaks

Media Wall

When did the buzz surrounding my topics take place online?

What are the biggest spikes of online engagement?



- Applications et Alimentat... 5M
- Circuits courts 10.6M
- Emballage alimentaire 50M
- Consommation alimentaire 11.4M
- ▲ 1/4 ▼

Most significant pea...



**Manger responsable: unusual increase of interactions in March**  
In March 2019, interactions increased by 1027% from the previous month



**Circuits courts: surprising increase of interactions in June**  
In June 2018, interactions increased by 2210% from the previous month

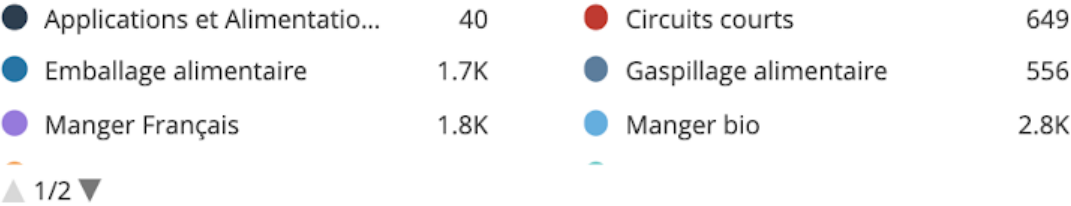
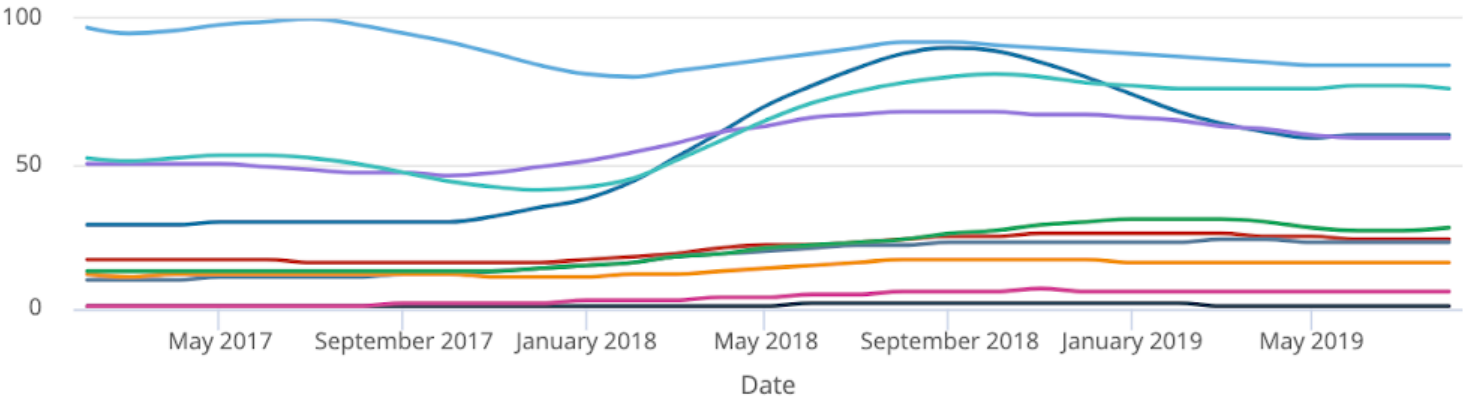


**Manger de saison: surprising spike of interactions in August**

# SIGNALS: SURFACE INTERESTS IN EMERGING TRENDS

## How interest is changing over time?

11th October 2016 - 11th October 2019



## Major shifts in interest



**Emballage alimentaire: increase of mentions in early September**  
Mentions increased by 196% in early September



**Top applications éco responsables: increase of mentions between early May 2017 & early November 2018**  
Mentions increased by 301% between early May 2017 & early November 2018

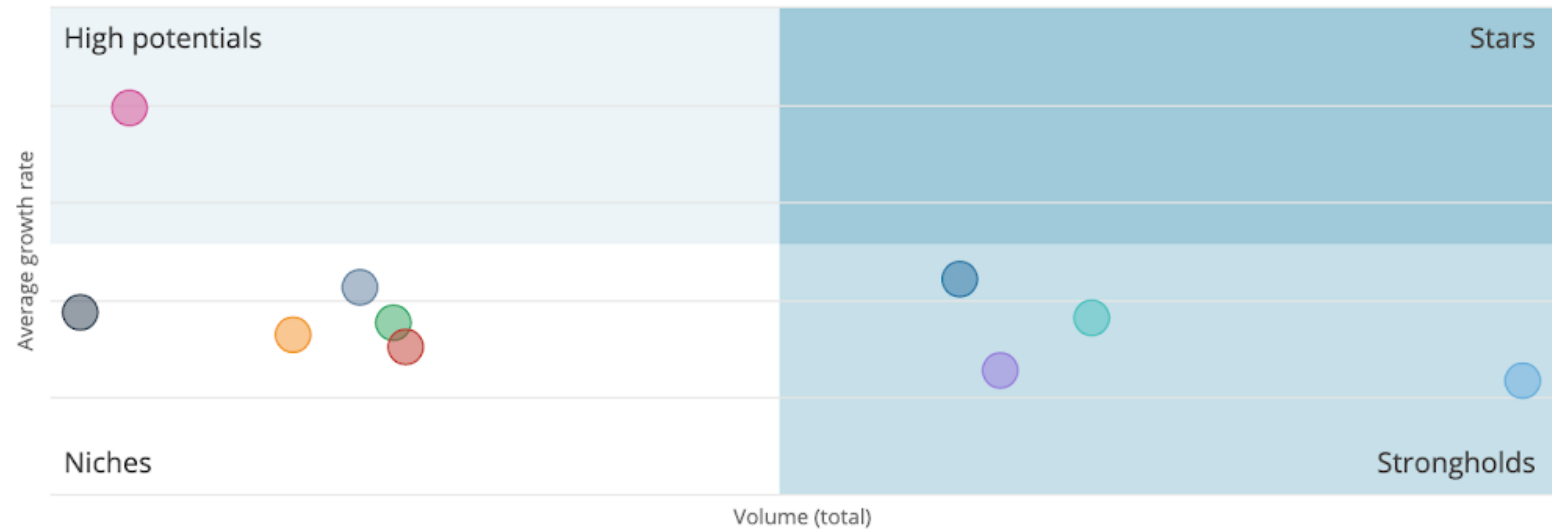


**Applications et Alimentation responsable : increase of mentions between early October & early September**  
Mentions increased by 129% between early October & early September

# DETECT VIRALITY OF TRENDS AND GROWTH POTENTIAL

## What are the most trending topics?

11th October 2016 - 11th October 2019



- Manger local
- Manger bio
- Emballage alimentaire
- Top applications éco respo...
- Manger Français
- Manger de saison
- Circuits courts
- Manger responsable
- Gaspillage alimentaire
- Applications et Alimentatio...

## Major trending topics

- Top applications éco responsables is a high potential - compared to other topics, growth rate is higher than average while volume is lower

Top applications éco responsables: average growth rate is lower than others (15% / Month), volume is lower than average (-90% compared to average)
- Emballage alimentaire is a stronghold - compared to other topics, growth rate is lower than average, while volume is higher

Emballage alimentaire: average growth rate is lower than others (6% / Month), volume is higher than average (23% compared to average)
- Gaspillage alimentaire is a niche - compared to other topics, growth rate & volume are lower than average

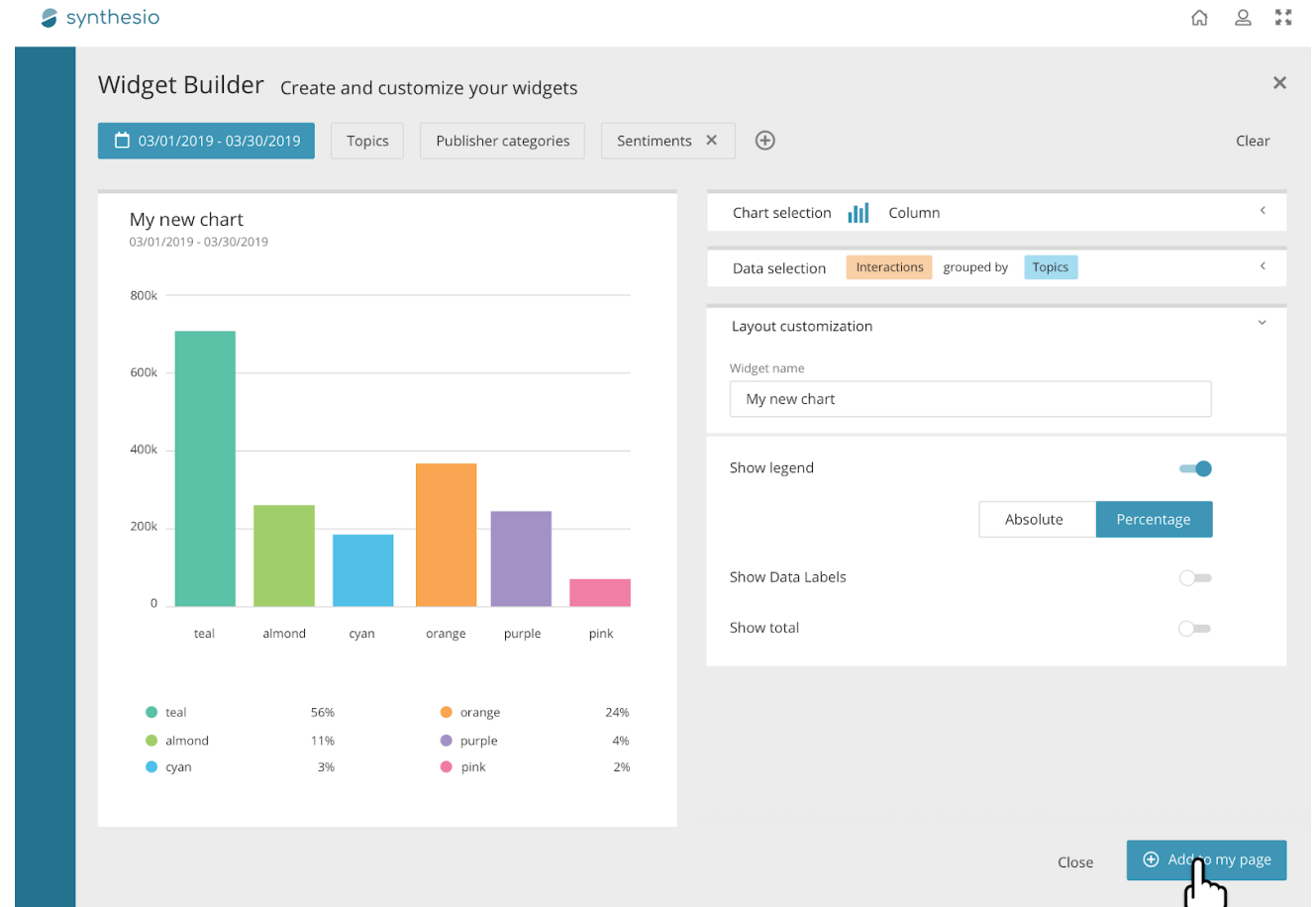
Gaspillage alimentaire: average growth rate is lower than others (6% / Month), volume is lower than average (-58% compared to average)
- Applications et Alimentation responsable is a niche - compared to other topics, growth rate & volume

# OPTIMIZE ANALYST TIME WITH BI-STYLE REPORTING

Slice-and-dice your data your way.

Create widgets using whatever dimensions work best to answer your tough business questions

Never be constrained in what combinations of metrics you want to investigate

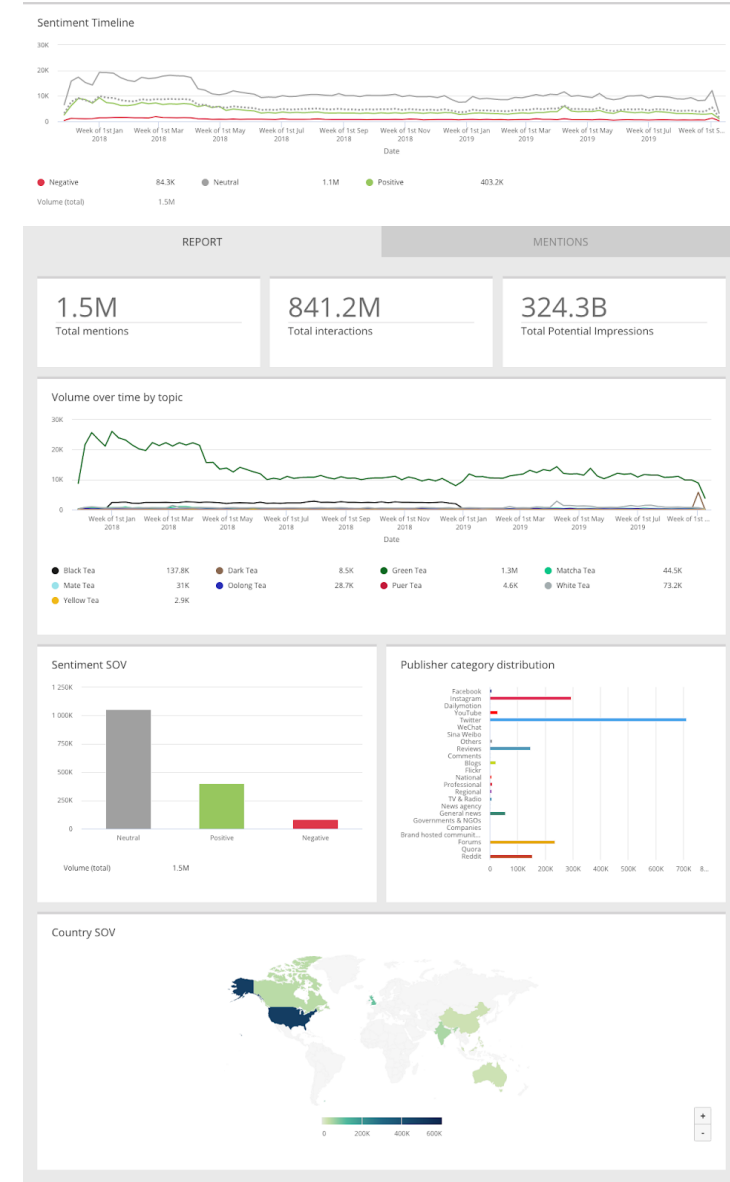




# DEEP DIVE TO UNDERSTAND CONTEXT

Dive deeper into every widget you create

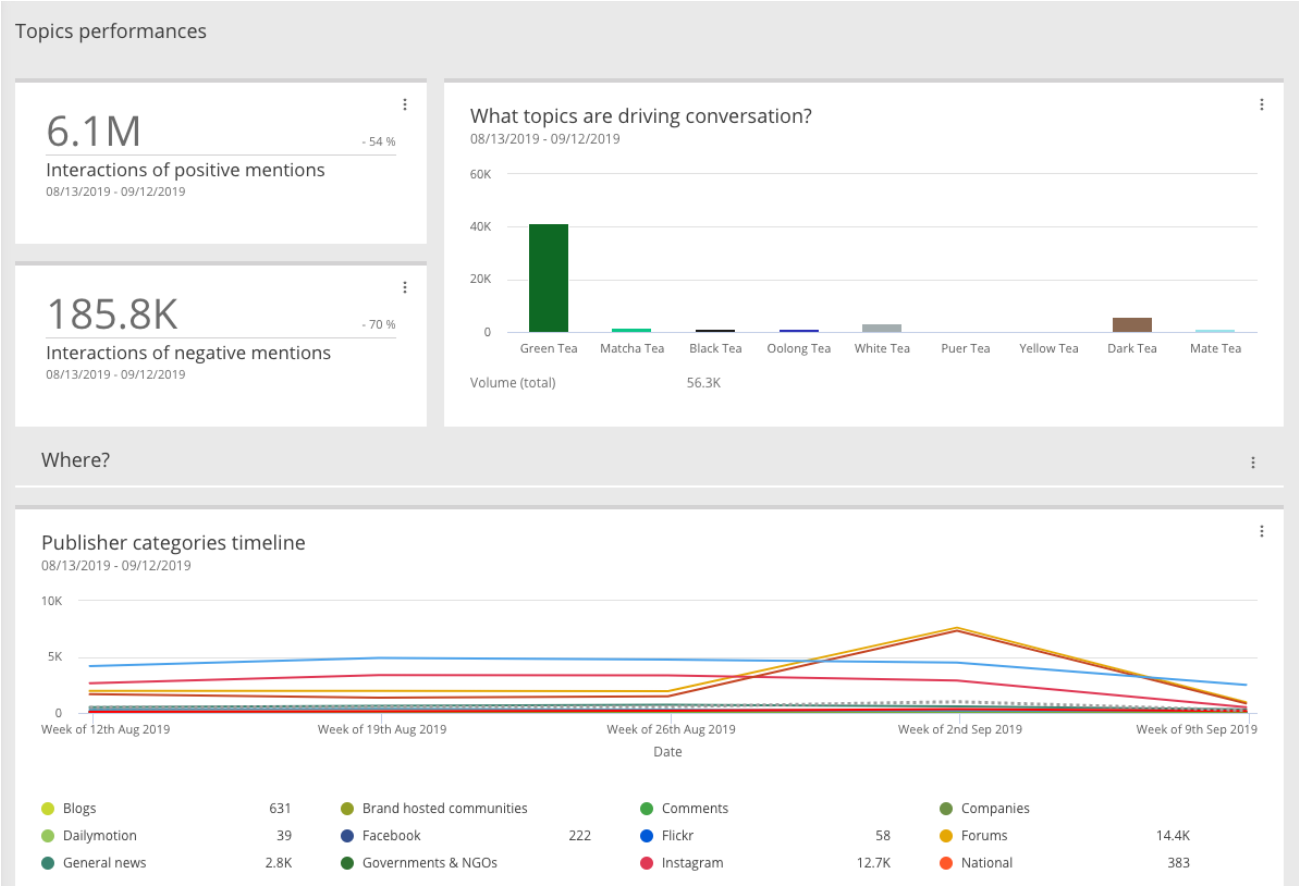
Each widget you build with the Widget Builder is supplemented by an auto-generated contextual report so that insights are always just a click away



# BUILD REPORT AND SHARE

Analysts build their conclusions and recommendations and can share results directly to their customers. This means:

**Faster time to insights for analysts who do not have to manually go through thousands of data points anymore**



THIS IS JUST THE BEGINNING  
OF NEW JOURNEY.

MUCH MORE TO COME IN THE  
COMING MONTHS.

STAY TUNED!

# THANK YOU

GAME CHANGERS







# CREATING THE NEXT GENERATION OF PUBLIC AFFAIRS RESEARCH

Darrell Bricker Global CEO, Ipsos Public Affairs

# 1

# A GROWING DEMAND FOR PUBLIC AFFAIRS RESEARCH



**Growth of  
professional public  
sector**



**Expansion of  
international NGOs**



**Increasing demand  
for evidence and  
accountability**



**Growth of citizen  
power, disruptive  
populism**



# WE ARE THE WORLD LEADER IN A GROWING MARKET

1

Expanding in both  
developed and  
developing markets

2

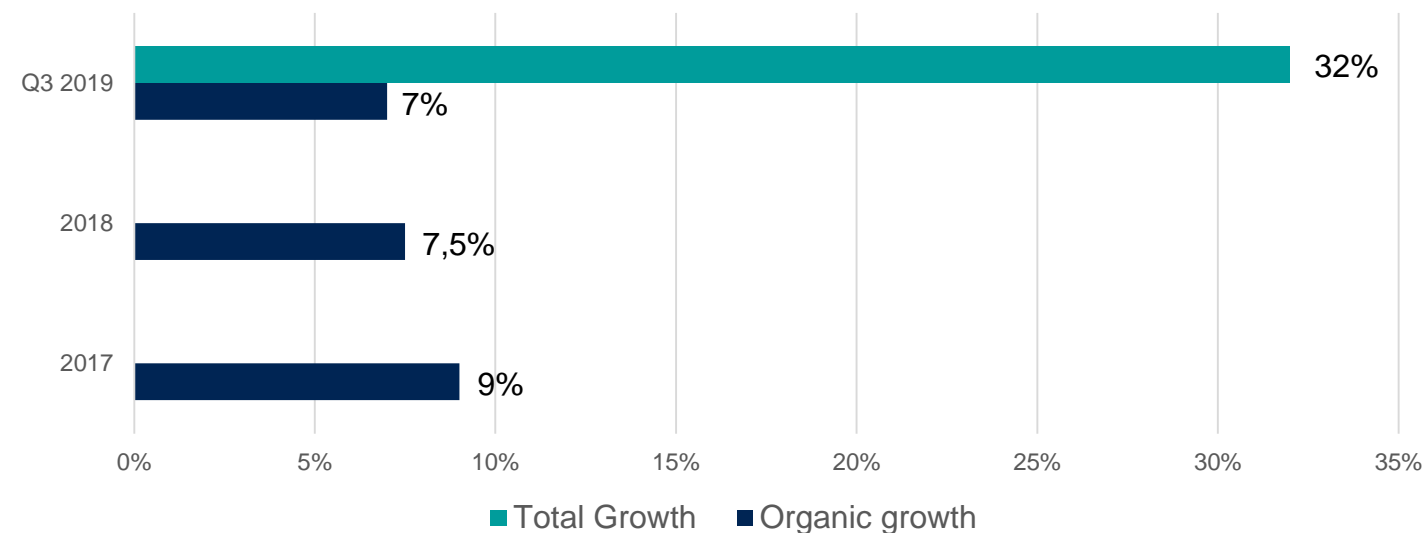
Large and robust market  
3-4B€

3

Mostly local, although  
global market is emerging

4

Ipsos Public Affairs  
growing fast



2017 Business Line Opinion and Social Research, 2018 and 2019 Citizens audience segment

# WHY OUR CLIENTS COME TO US

Strong data collection capabilities

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Strong social science expertise

---

Superior project management

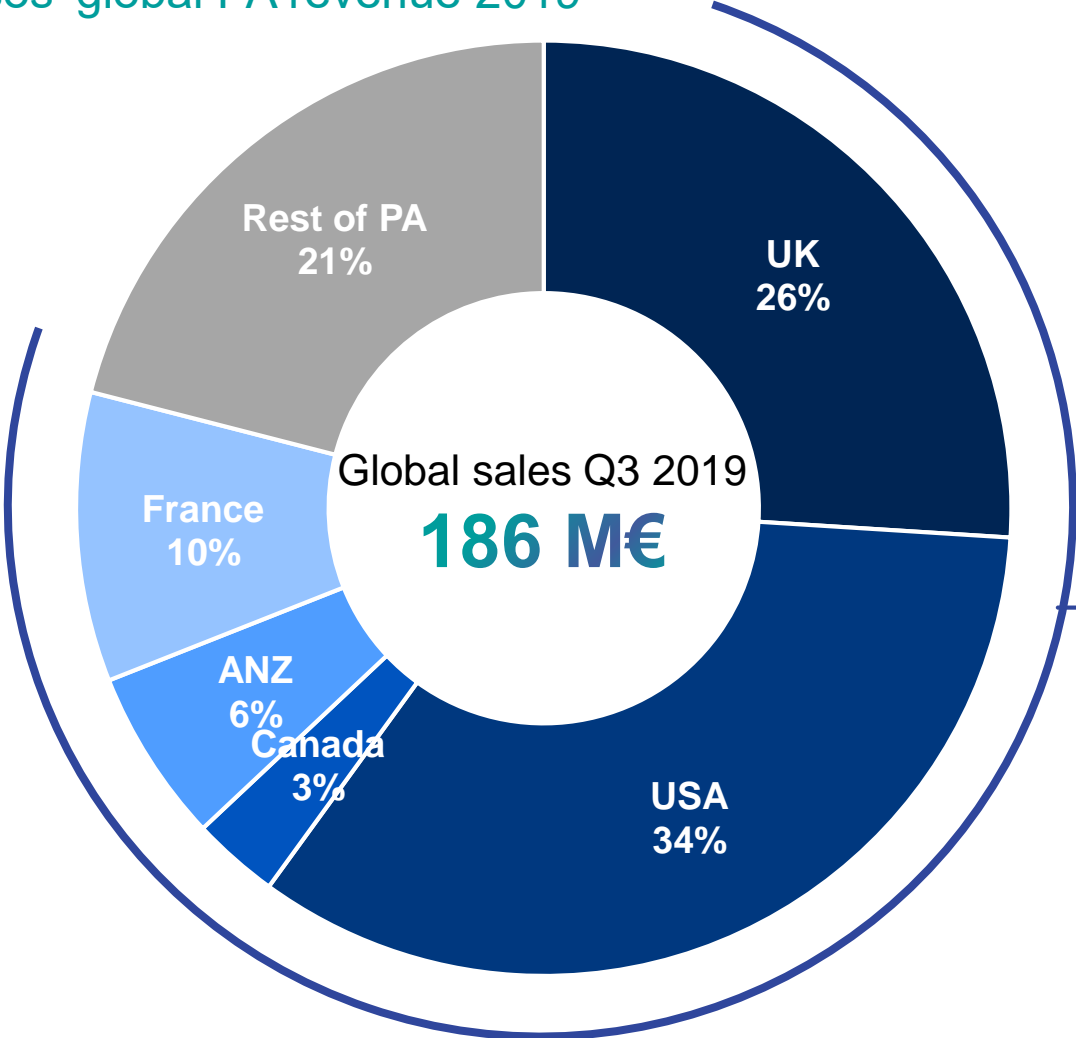
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Subject matter expertise and advice



# WE ARE STRONG IN THE US AND UK, AND GROWING IN THE REST OF THE WORLD

Ipsos' global PA revenue 2019



UK + USA represent

60%

of global spend

60%

of Ipsos public affairs revenue

Top 5 countries represent

80%

of PA's global revenue





# **NEXT GENERATION OF KNOWLEDGE PANEL®**

---

# 2

# PUBLIC SECTOR MARKET IS FRACTURED AND EVOLVING



**INDUSTRY  
DISRUPTION**



**PUBLIC SECTOR  
LAGGING**



**BUDGET  
PRESSURES  
MOUNTING**



**FUTURE  
ALTERNATIVES,  
EXPANSION  
OPPORTUNITIES**



# KEY ATTRIBUTES OF KNOWLEDGE PANEL®



- An invitation-only panel recruited by postal mailing to randomly selected American households.
- Each panelist is a verified real person. No bots. No fake data.
- The result is the best possible representation of the American public. Projectable.

## ADDRESS BASED SAMPLING

Recruited to provide **best possible representation of US households**

## LARGEST PANEL OF ITS KIND

Large size targeting rare populations.

55,000 members 2,200 profiles

## UNBIASED DATA

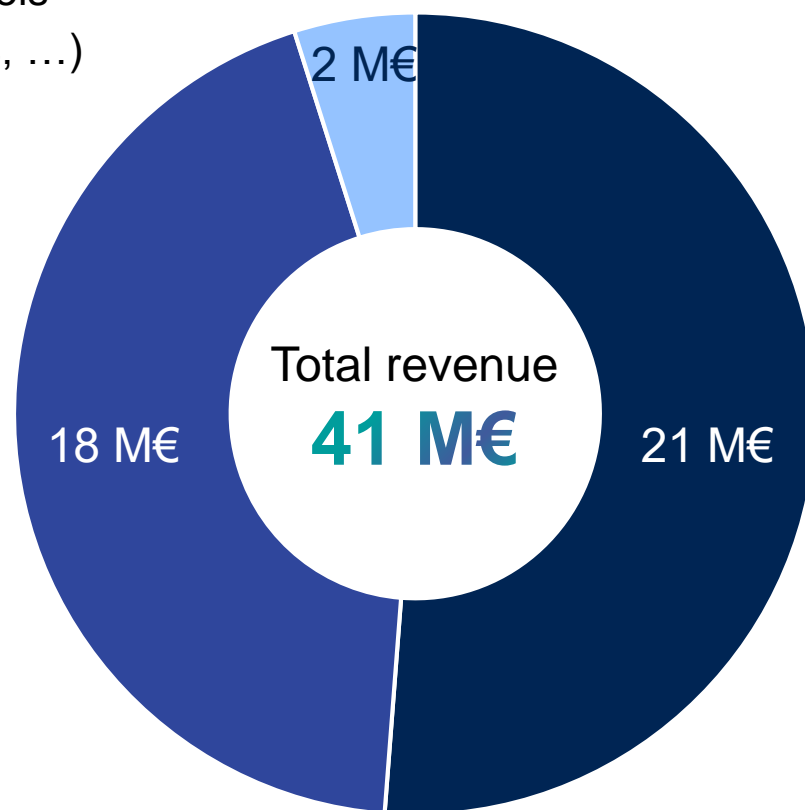
Rigorous probability sampling produces the truest estimates of attitudes and opinions.



# KNOWLEDGE PANEL BY THE NUMBERS

## Budget 2019

- General Knowledge Panel
- Proprietary Panels
- Other (Omnibus, ...)



Business is driven by General KnowledgePanel® (KP) – and Proprietary probability panels which are modeled after KP and leverage the same **integrated** systems and **specialized** staff.

# NEXT GENERATION OF POLITICAL POLLS

---

# 3

# WE BRING OUR BEST EXPERTISE TO EACH ELECTION

## 1

### FORWARD PLANNING AND TIMELY APPROVAL PROCESS

- Rules of Engagement and Guidelines
- Qualified inventory of the upcoming elections

## 2

### RIGHT TEAMS AND METHODS APPLY GOLDEN RULES

- Elections Research SharePoint
- Good understanding of the local teams' capabilities and skills
- Internal Research of Research (shared) Plan

## 3

### BEST SUPPORT FOR EACH SPECIFIC ELECTION

- Assignment of Referees
- Spread of best practices
- Systematic Post-mortem Review
- Database built to accumulate facts and learnings

## 4

### COMMUNICATION OF OUR POLLS CORRECTLY DELIVERED

- Communication plan as part of the election qualification (context) and documentation

# WE ARE ACTIVE EVERYWHERE WE CAN BE

	JANUARY – JUNE 2019 % TOTAL		JULY – DECEMBER 2019 % TOTAL	
	Jan to Jun	Elections	Jul to Dec	Elections
ELECTIONS	65	100,0%	31	100,0%
ELIGIBLE/DEMOCRATIC	58	89,2%	23	74,2%
POSITIVE GUIDANCE	24	36,9%	12	38,7%
DECISION TO COVER	17	26,2%	10	32,3%

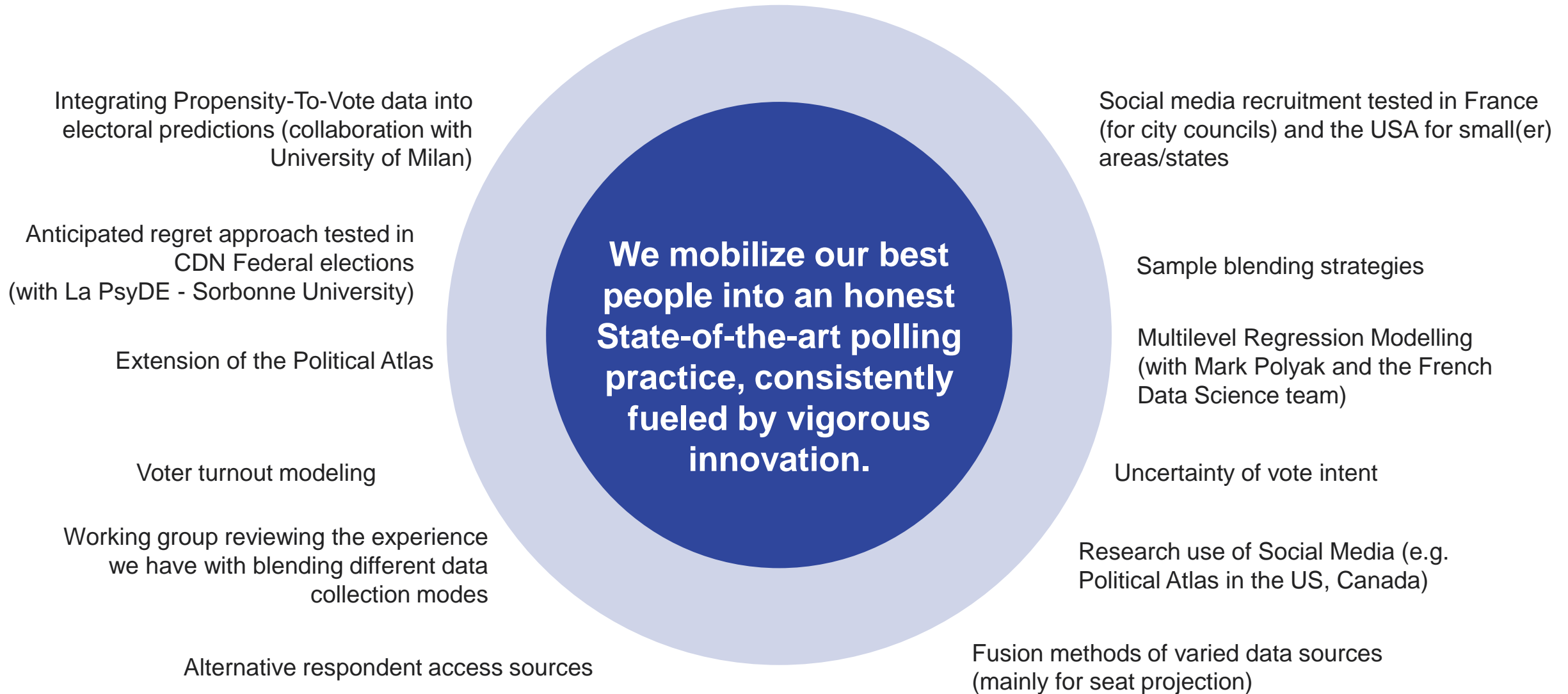
**Elections:** Total number of identified elections (national or local for major markets)

**Eligible/Democratic:** Eligibility based on [The Economist] Democracy index: electoral process and civil liberties

**Positive Guidance:** Based on Ipsos PA presence, operational capability.



# WE BRING INNOVATION TO EVERY ELECTION



# CANADIAN POLITICAL ATLAS 2019

Measuring real-time the impact of political debates

## BUSINESS QUESTION

Who's winning the TV debate? What are the topics that are driving online reactions?

## SOURCES

Twitter  
6 political leaders and 10 societal topics.

## METHOD USED

Real-time text mining  
analysis of Tweets in  
reaction to the TV debate

## ALGORITHMS USED

Topic modelling  
Sentiment analysis

Our Canadian Political Atlas enabled journalists and political parties to get an **immediate feedback** on the performance of candidates during political TV debates and main topics of concerns.

# CANADIAN POLITICAL ATLAS 2019

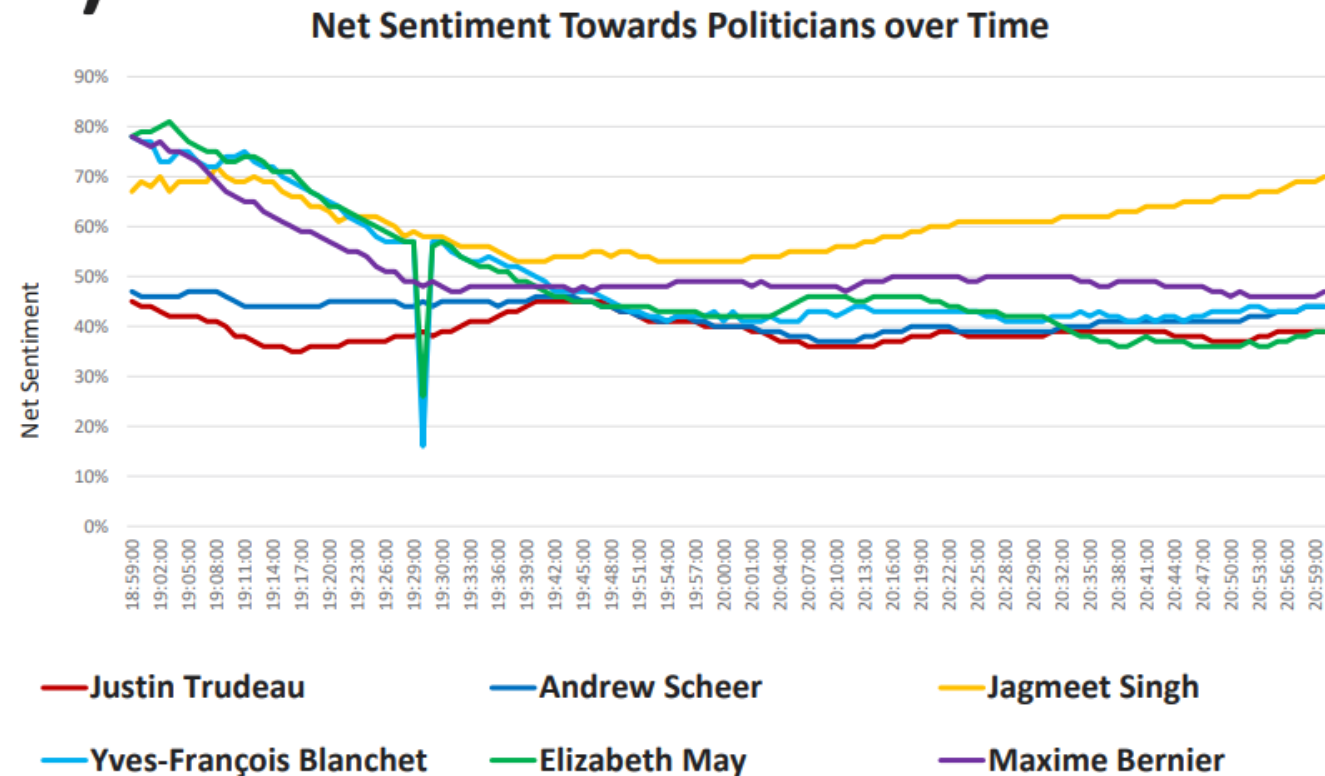
## Net Sentiment Towards Politicians 7:00 – 9:00 PM (ET)

CANDIDATE

AVERAGE PER MINUTE

(>50 NET POSITIVE, <50 NET NEGATIVE)

<b>Jagmeet Singh</b>	<b>61</b>
<b>Maxime Bernier</b>	<b>52</b>
<b>Yves-Francois Blanchet</b>	<b>50</b>
<b>Elizabeth May</b>	<b>49</b>
<b>Andrew Scheer</b>	<b>42</b>
<b>Justin Trudeau</b>	<b>39</b>



COMMENTARY

# COMMENTARY: Singh scores win with ‘sentiment’ jump on Twitter during debate, Ipsos says

BY GREGORY JACK - SPECIAL TO GLOBAL NEWS

Posted October 8, 2019 9:42 am

Updated October 8, 2019 6:10 pm

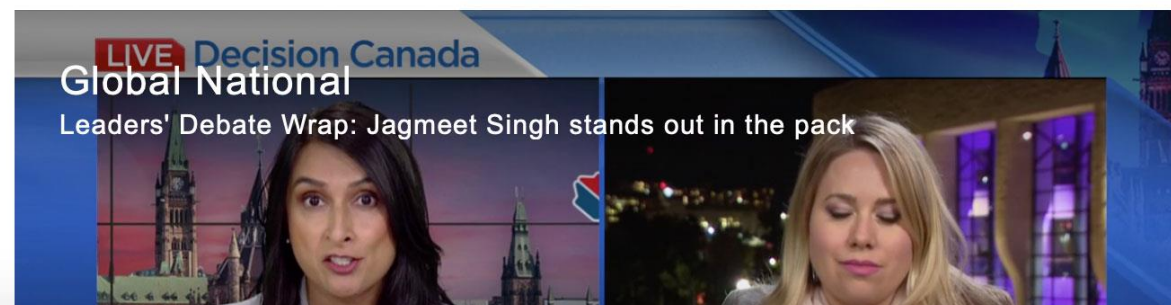
MORE FROM GLOBAL NEWS



COMMENTARY: An anti-racism wish list for Canada's new Parliament



Roy Green: The spectre of separation is hardly new to Canada





# UPCOMING ELECTIONS

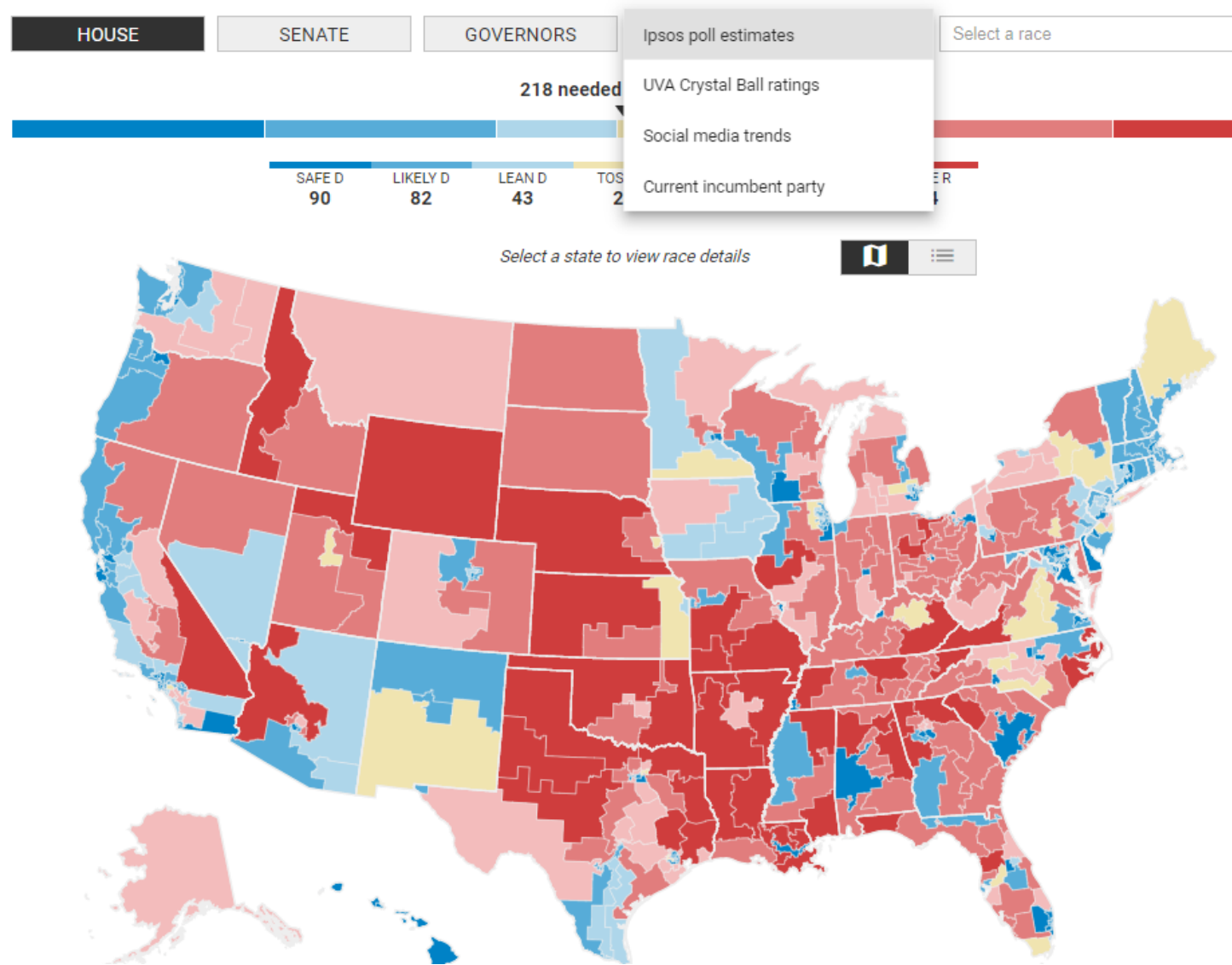
## 2019

COUNTRY	ELECTION
USA	Gubernatorial, state, legislative
SPAIN	General
UK	General
CROATIA	Presidential 1st round // run-off 20 Jan

## 2020

COUNTRY	ELECTION
INDIA	Delhi - State Assembly Election
FRANCE	Municipal elections
SERBIA	Parliamentary elections
AUSTRALIA	<u>Tasmanian Legislative Council elections</u>
UK	Local elections
AUSTRALIA	<u>Northern Territory general election</u>
AUSTRALIA	<u>Australian Capital Territory general election</u>
AUSTRALIA	<u>Queensland state election</u>
INDIA	Bihar - State Assembly Election
USA	Presidential, Gubernatorial, state, legislative
NEW ZEALAND	General elections
NEW ZEALAND	<u>Cannabis referendum</u>
BRAZIL	Municipal elections
CROATIA	Parliamentary elections
POLAND	Presidential election

# WHAT'S NEXT: AMERICAN POLITICAL ATLAS



**THANK  
YOU**

**GAME CHANGERS**



# IPSOS FOUNDATION

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Marie-Christine BARDON  
President Ipsos Foundation



# SUPPORTING THE EDUCATION OF MIGRANTS AND REFUGEE CHILDREN

**The Ipsos Foundation is dedicated to providing access to education for children and youth who have been forcibly displaced from their home.**

**Innovative  
and non-verbal  
education**

**For unaccompanied  
migrant minors in  
big cities**

**In communities  
and settlements**

**Adaptation of  
mainstream  
education systems**

স্বাস্থ্য ও শারীরিক  
(পাঠ্যপুস্তক)  
তৃতীয় শ্রেণি

# INSIDE THE FOUNDATION

1

**Acting internationally**

2

**Powered by Ipsos  
Employees.**

Applications driven by  
Ipsos Ambassadors and  
employees

3

**Partnership**  
with other associations  
including Unesco



4

**Applications and  
awards**  
voted by the Foundation  
board

# INSIDE THE FOUNDATION

PROJECTS

54

DURATION

1-2 years

COUNTRIES

35

CHILDREN

35 000

## PRINCIPLES & GUIDELINES

- Analyze projects on relevance, **financial viability** and capacity to measure impact
- Fund projects which are **innovative enough to be leveraged** to other areas/regions
- **Direct involvement of Ipsos sponsors: close relationship, monitoring, visiting during the project period**
- Seek to **achieve tangible and sustainable results**



# SOME OUTSTANDING PROJECTS



## BETTER LEARNING FOR ROHINGYA CHILDREN

*Date: 2019/2020*  
Ipsos & Unesco Bangladesh  
**NGO: Plan International**



## IMPROVE READING AND LANGUAGE SKILLS OF AFRICAN AUSTRALIAN

*Date: 2018/2019*  
Australia  
**NGO: Care International**

## ENABLE UNACCOMPANIED MINORS TO ACCESS TO EDUCATION

*Date: 2019/2020*  
Paris  
**NGO: Droit à l'Ecole**

## PROMOTE READING AND LITERACY FOR LATAM MIGRANTS AND REFUGEES

*Date: 2019/2020*  
Texas USA  
**NGO: Reading is Fundamental**

## REDUCTION OF SCHOOL DROP-OUT RATE FOR YOUNG SYRIAN REFUGEES

*Date: 2019/2020*  
Lebanon  
**NGO: HOPE**

## EMPOWER MIGRANT YOUTH WITH THE CREATION OF SOCIAL ENTREPRISE PROJECT

*Date: 2018/2019*  
Colombia  
**NGO: Coschool**



# FOR INTERNAL DISPLACEMENT AND MIGRANT CHILDREN IN COLOMBIA / VENEZUELA



# THANK YOU

GAME CHANGERS



# BREXIT BRITAIN

**Kelly Beaver, MD Public Affairs, Ipsos MORI  
Senior Research Fellow, Kings College London**

**[Kelly.beaver@ipsos.com](mailto:Kelly.beaver@ipsos.com)**



Ipsos MORI

# What should happen if a Brexit deal cannot be agreed?

IF THE UK AND THE EU CANNOT AGREE A DEAL ON THE TERMS OF THE UK'S DEPARTURE FROM THE EU BY OCTOBER 31<sup>ST</sup>, WOULD YOU SUPPORT OR OPPOSE...

SUPPORT

OPPOSE

Another referendum where the UK public is given the option to remain in the EU



Net support

+8

Delaying the UK leaving the EU until a deal is agreed



+6

The UK leaving the European Union without a deal, sometimes referred to as 'no deal Brexit'



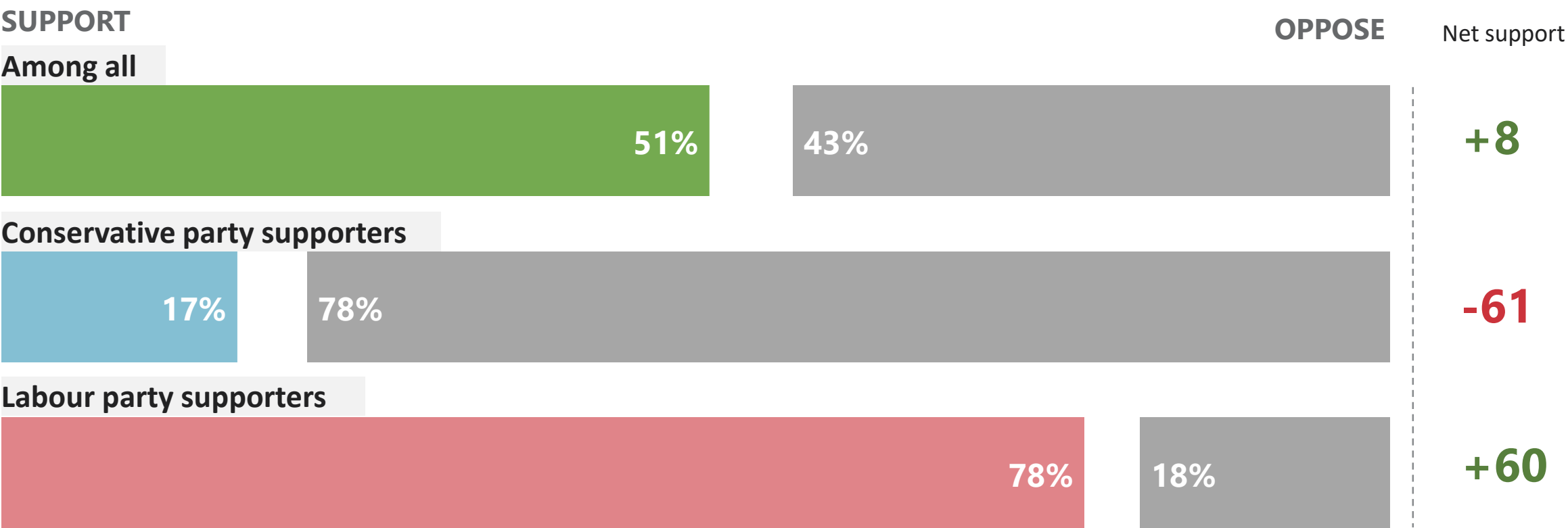
-4

Base: 1,006 British adults 18+, 300 Conservative party supporters, 181 Labour party supporters, 13-16 September 2019



# Support for another referendum with Remain as an option

IF THE UK AND THE EU CANNOT AGREE A DEAL ON THE TERMS OF THE UK'S DEPARTURE FROM THE EU BY OCTOBER 31<sup>ST</sup>, WOULD YOU SUPPORT OR OPPOSE ANOTHER REFERENDUM WHERE THE UK PUBLIC IS GIVEN THE OPTION TO REMAIN IN THE EU?



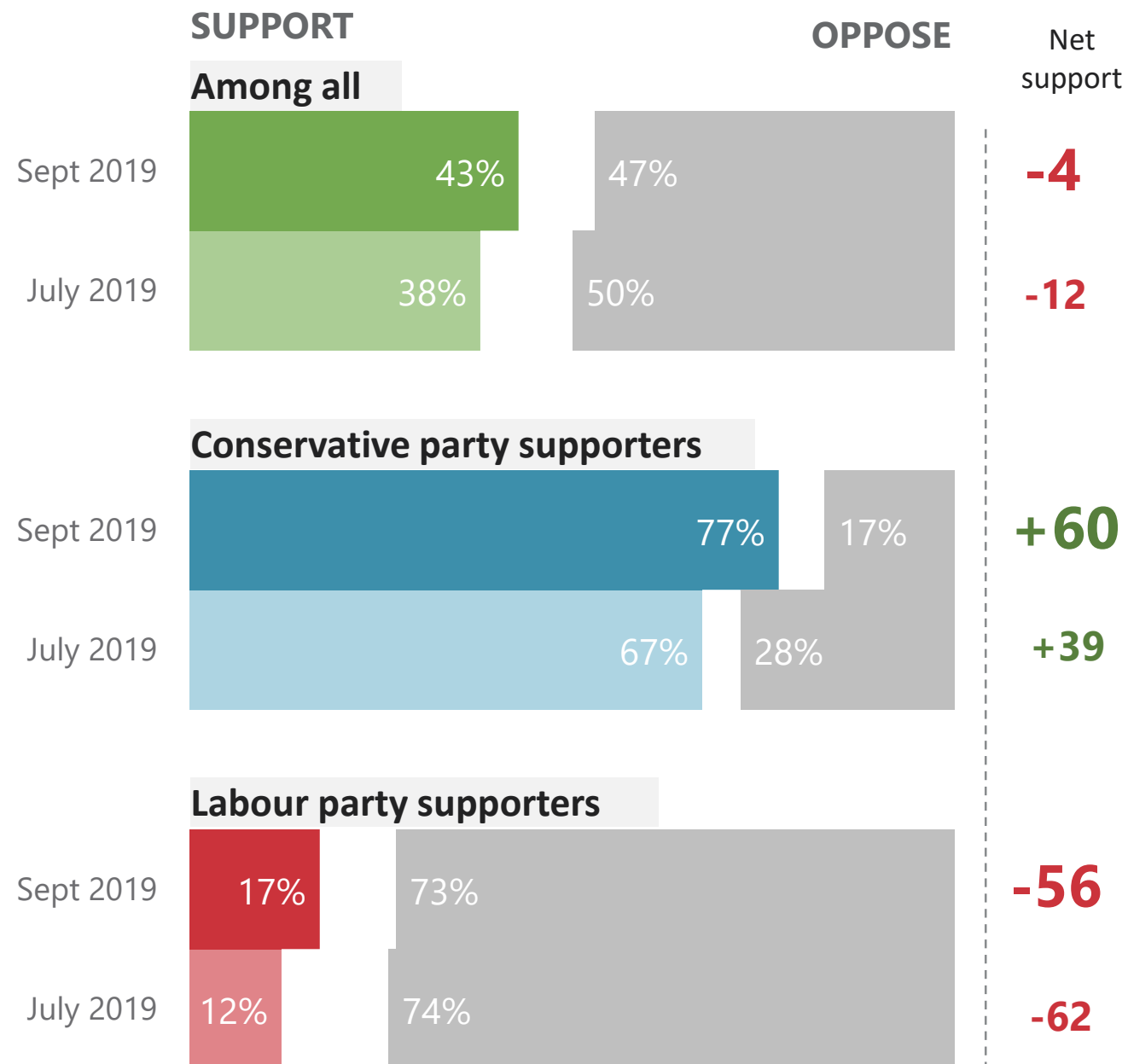
Base: 1,006 British adults 18+, 300 Conservative party supporters, 181 Labour party supporters, 13-16 September 2019

# Support for leaving the EU without a deal

IF THE UK AND THE EU CANNOT AGREE A DEAL ON THE TERMS OF THE UK'S DEPARTURE FROM THE EU BY OCTOBER 31<sup>ST</sup>, WOULD YOU SUPPORT OR OPPOSE THE UK LEAVING THE EUROPEAN UNION WITHOUT A DEAL, SOMETIMES REFERRED TO AS A 'NO DEAL BREXIT'?

**Base:** 1,006 British adults 18+, 300 Conservative party supporters, 181 Labour party supporters, 13-16 September 2019

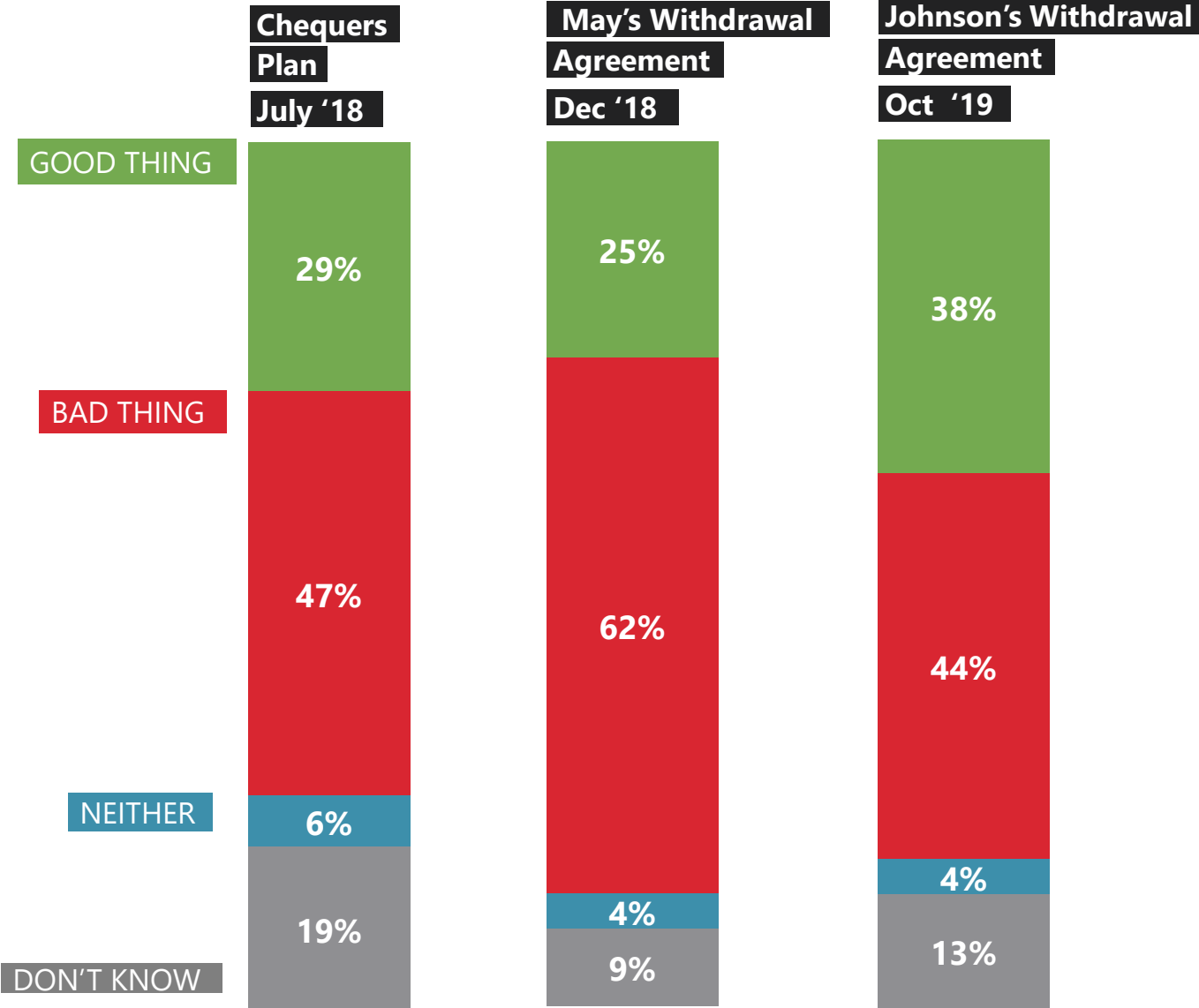
**Source:** Ipsos MORI Political Monitor



# Public opinion on the Withdrawal Agreement

AS YOU MAY KNOW, THE GOVERNMENT AND THE EUROPEAN UNION HAVE REACHED AN AGREEMENT ON THE TERMS OF BRITAIN'S WITHDRAWAL FROM THE EUROPEAN UNION. FROM WHAT YOU KNOW OR HAVE HEARD, DO YOU THINK IT WOULD BE A GOOD THING OR BAD THING FOR THE UK AS A WHOLE TO WITHDRAW FROM THE EU ON THESE TERMS?

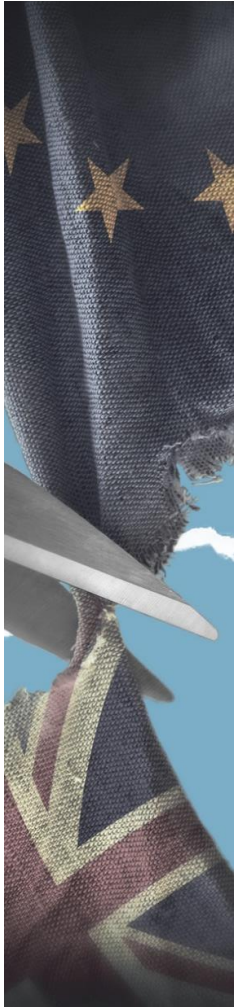
*\*Chequers: And from what you know or have heard, do you think Theresa May's plan for Britain's future relationship with the European Union (also known as The Chequers plan) would be a good thing or bad thing for the UK as a whole?*



Base: 1,001 British adults 18+, 25-28 October 2019

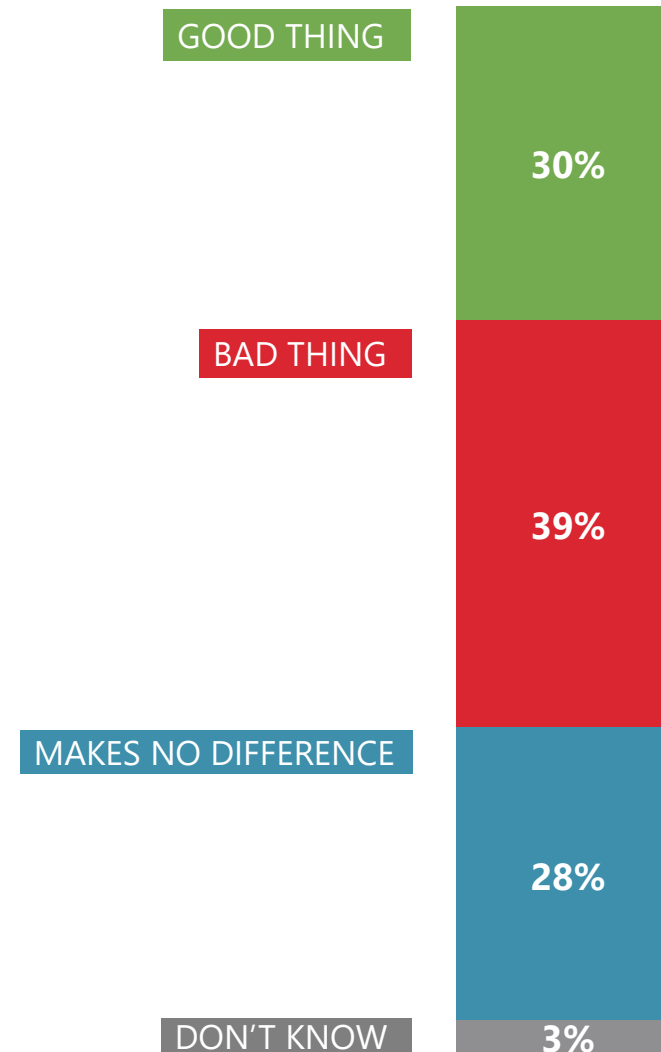


Source: Ipsos MORI Political Monitor



## Impact of a Brexit extension beyond October 31st

AS YOU MAY KNOW, BRITAIN WAS SCHEDULED TO LEAVE THE EUROPEAN UNION ON OCTOBER 31<sup>ST</sup>. IF BRITAIN DOES NOT LEAVE THE EU ON OCTOBER 31<sup>ST</sup>, DO YOU THINK THAT WILL BE A GOOD THING OR A BAD THING FOR THE COUNTRY, OR WILL IT MAKE NO DIFFERENCE?



Base: 1,001 British adults 18+, 25-28 October 2019



**Ipsos MORI**

Source: Ipsos MORI Political Monitor



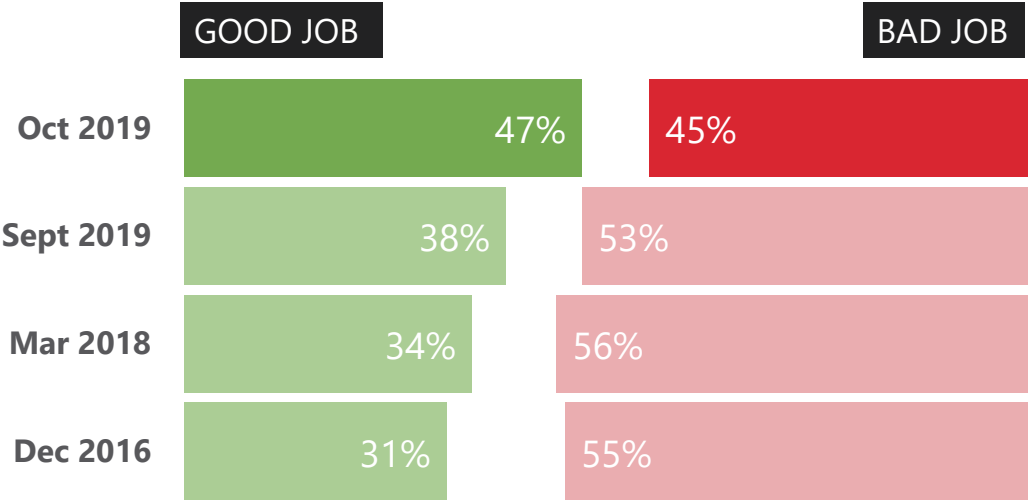
# Handling Britain's exit from the European Union

DO YOU THINK EACH OF THE FOLLOWING HAS DONE A GOOD JOB OR A BAD JOB AT HANDLING BRITAIN'S EXIT FROM THE EUROPEAN UNION?

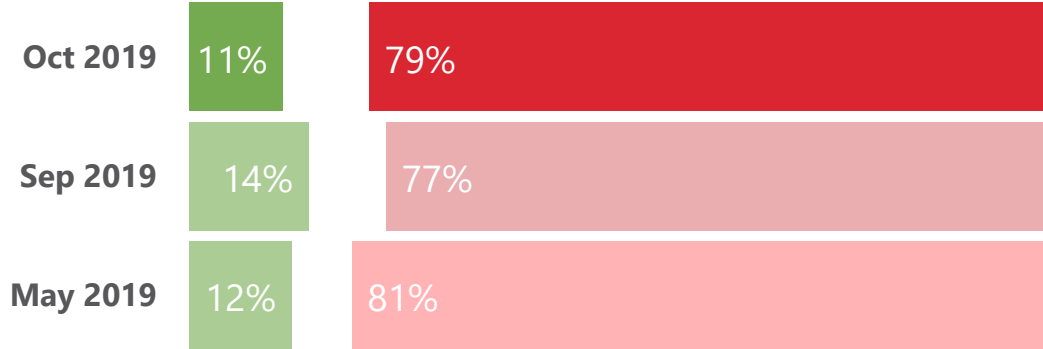
Base: 1,001 British adults 18+, 25-28 October 2019



BORIS JOHNSON



JEREMY CORBYN



Source: Ipsos MORI Political Monitor

Handling Britain's exit from the European Union

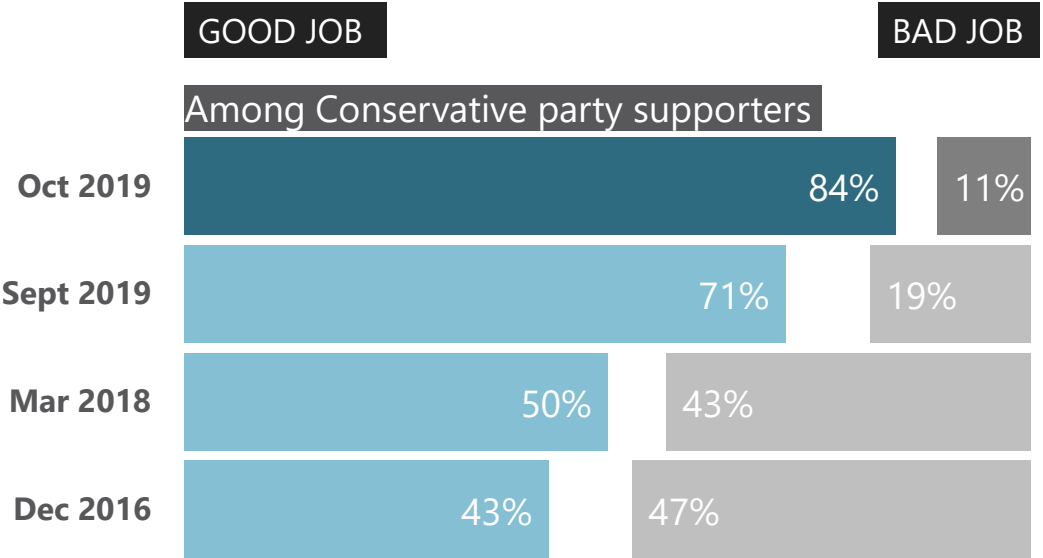
Among own party supporters

DO YOU THINK EACH OF THE FOLLOWING HAS DONE A GOOD JOB OR A BAD JOB AT HANDLING BRITAIN'S EXIT FROM THE EUROPEAN UNION?

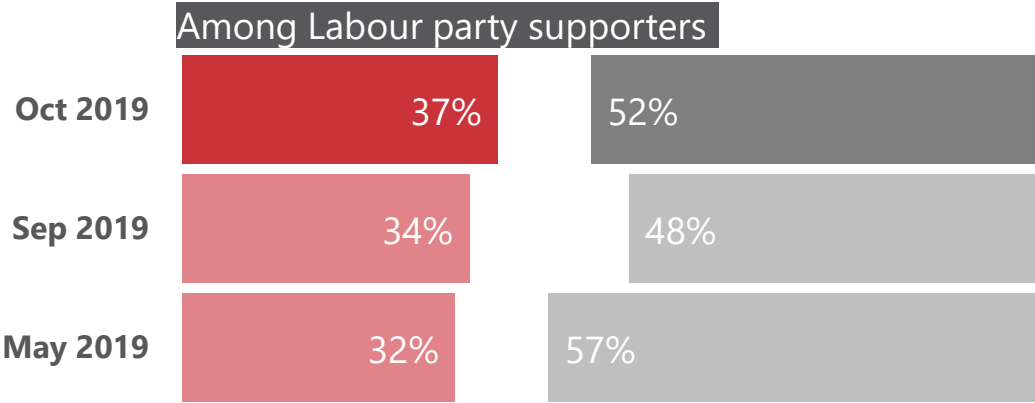
Base: 1,001 British adults 18+, 25-28 October 2019



BORIS JOHNSON



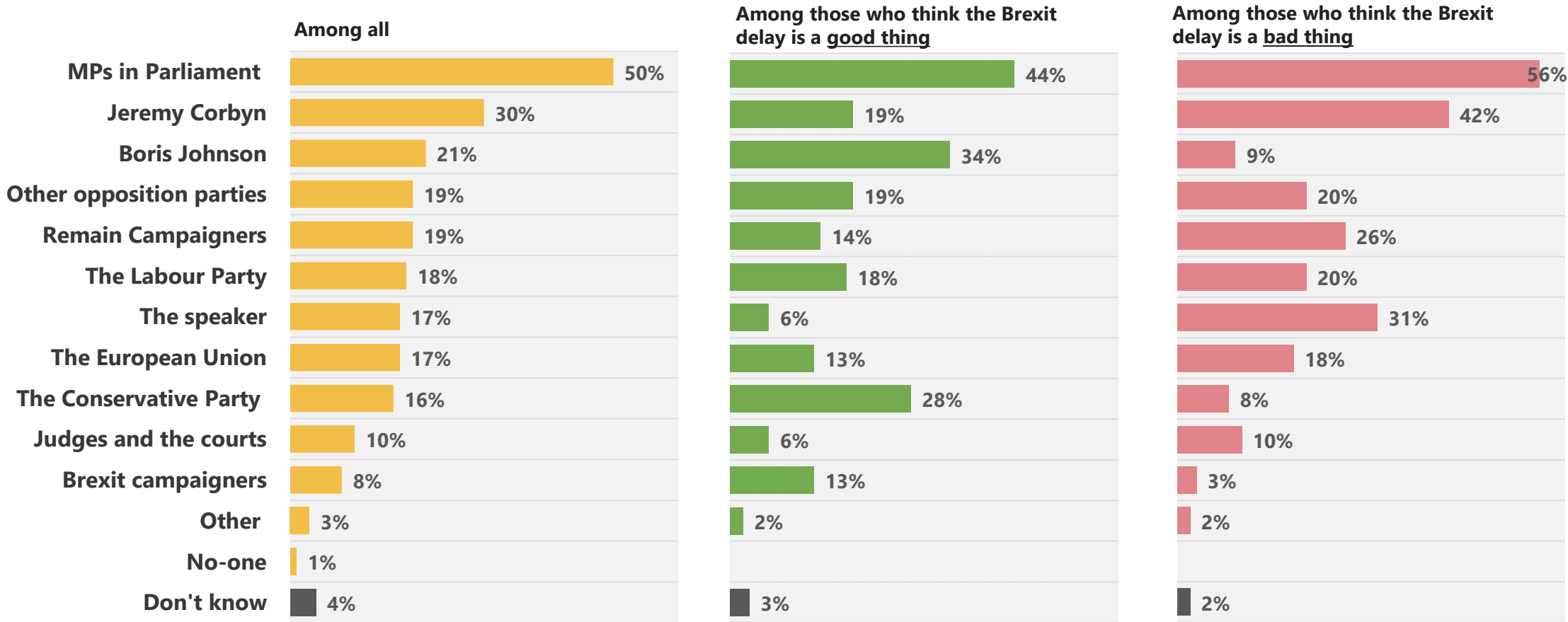
JEREMY CORBYN



Source: Ipsos MORI Political Monitor

# Responsibility for delaying Britain leaving the European Union

AND IF BRITAIN DOES NOT LEAVE THE EUROPEAN UNION BY 31<sup>ST</sup> OF OCTOBER, WHICH TWO OR THREE OF THE FOLLOWING, IF ANY, DO YOU THINK WOULD BE MOST RESPONSIBLE FOR THIS DELAY?



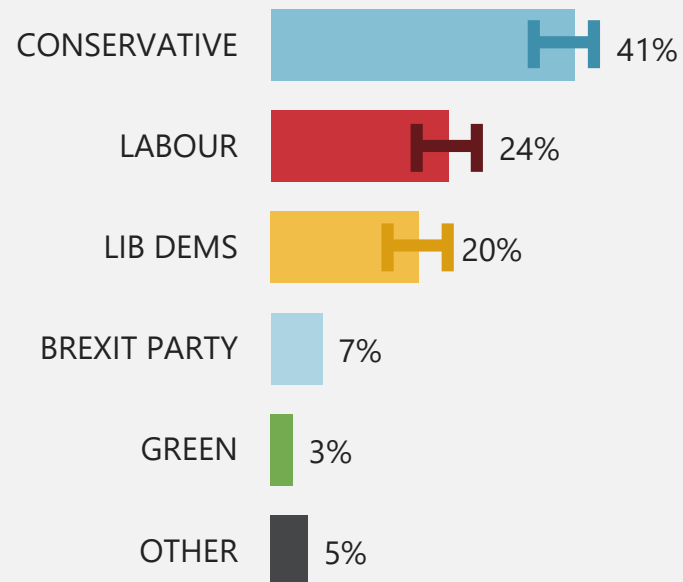
Base: 1,001 British adults 18+, 334 who think Brexit delay is a good thing, 389 who think Brexit delay is a bad thing, 25-28 October 2019

Source: Ipsos MORI Political Monitor

# Voting Intention: October 2019

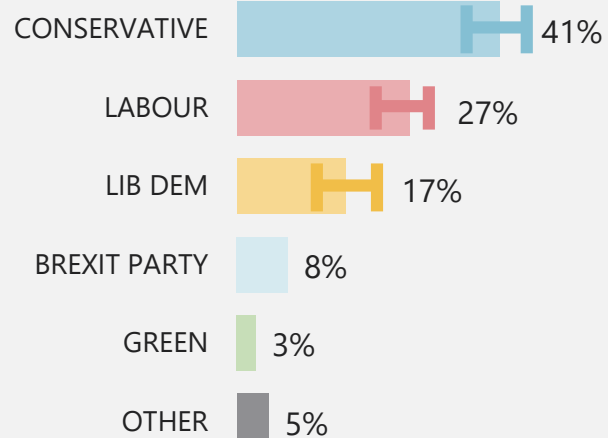
HOW WOULD YOU VOTE IF THERE WERE A GENERAL ELECTION TOMORROW?

## HEADLINE VOTING INTENTION



**CONSERVATIVE LEAD = +17**

## ALL GIVING A VOTING INTENTION



**CONSERVATIVE LEAD = +14**

**Base:** 1,001 British adults 18+, 25-28 October 2019; Headline Voting Intention: all 9/10 certain to vote and always/usually/it depends vote in General Elections = 791 Margin of error is displayed at +/- 4% All polls are subject to a wide range of potential sources of error. On the basis of the historical record of the polls at recent general elections, there is a 9 in 10 chance that the true value of a party's support lies within 4 points of the estimates provided by this poll, and a 2 in 3 chance that they lie within 2 points. This is especially important to keep in mind when calculating party lead figures.



**Ipsos MORI**

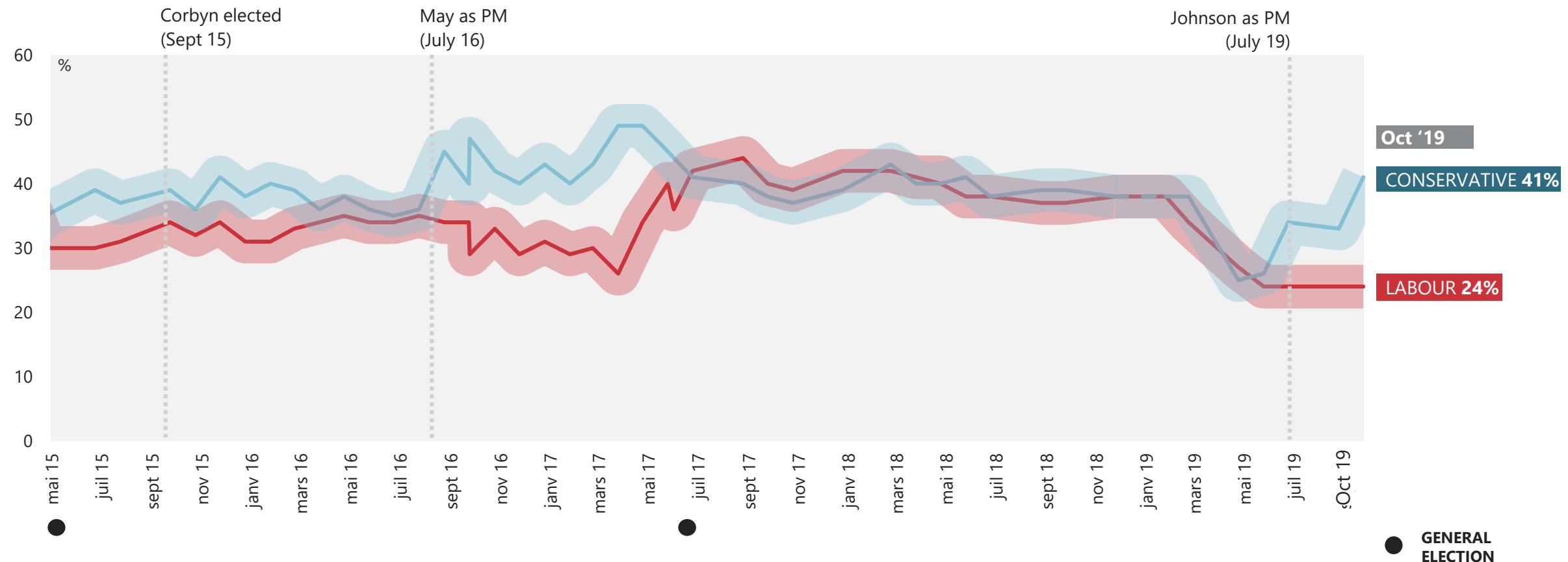


**Source:** Ipsos MORI Political Monitor



# Headline voting intention: Since 2015 General Election

HOW WOULD YOU VOTE IF THERE WERE A GENERAL ELECTION TOMORROW?



Base: c. 800 British adults; Prior to July 2015 the turnout filter is "All certain to vote"; From July 2015 turnout filter is "all 9/10 certain to vote and always/usually/it depends vote in General Elections. Note small change in methodology in approach to prompting Brexit Party in July 2019

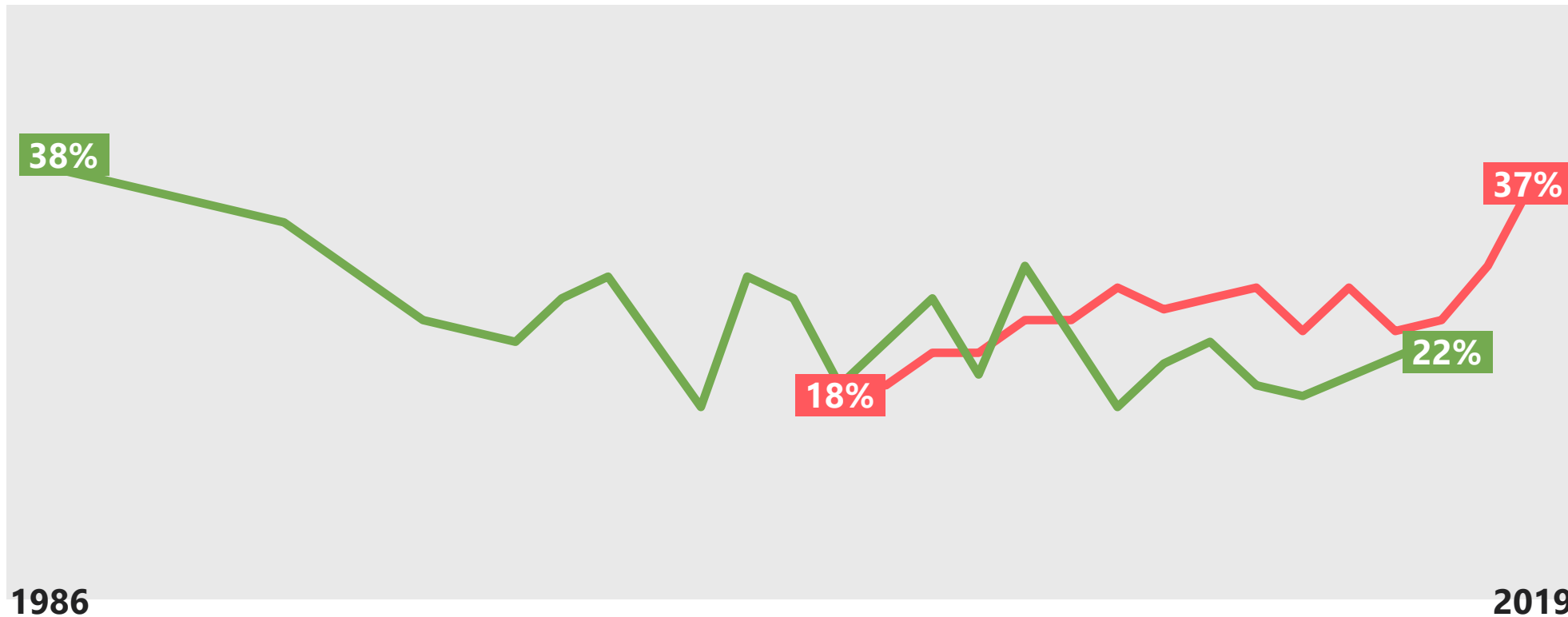
Source: Ipsos MORI Political Monitor

A photograph of Donald Trump and Nigel Farage standing in front of an ornate, gold-colored door. Donald Trump is on the left, wearing a dark blue suit and a white shirt, giving a thumbs-up. Nigel Farage is on the right, wearing a blue suit and a red patterned tie, laughing with his mouth open and hands gesturing. A semi-transparent grey banner with white text is overlaid across the middle of the image.

# DIVISION AND FRAGMENTATION?

# HYSTERESIS

# GROWING DISCONTENT OVER LONG TERM WITH GOVERNMENT IN THE UK, ADDED TO BY BREXIT PARALYSIS



"System of government needs a great deal of improvement"

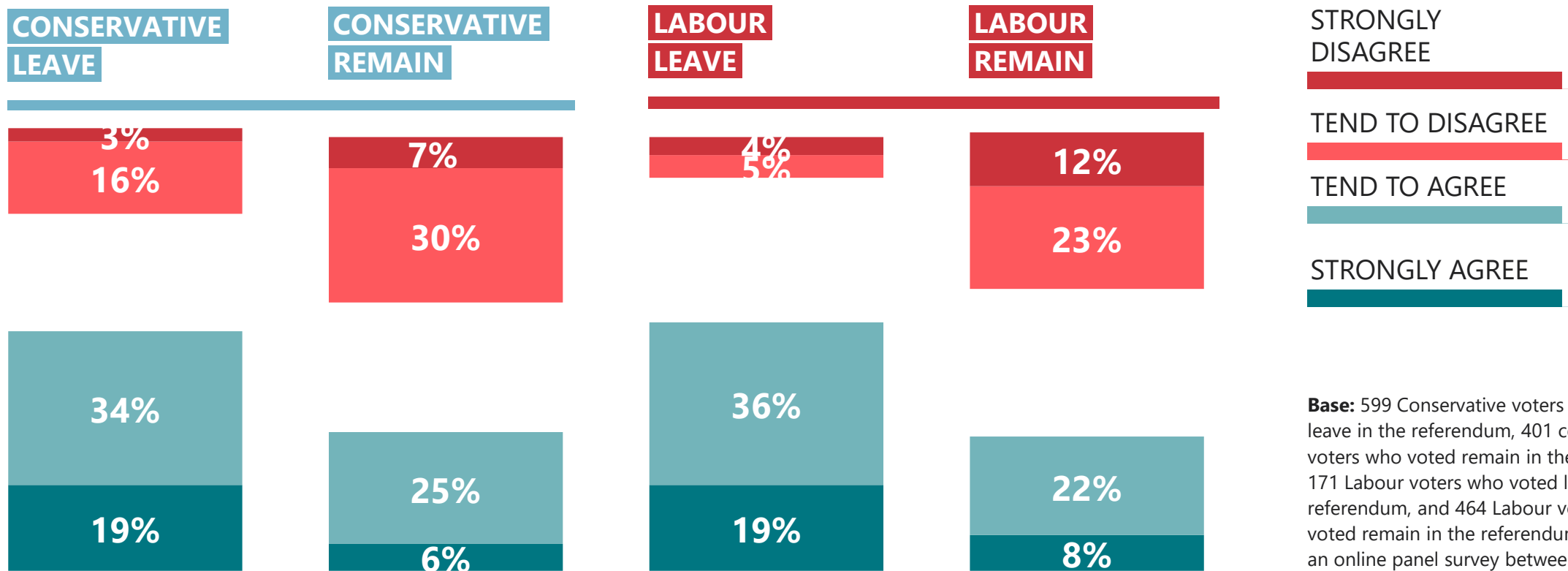
"Trust in government to put needs of nation first"

How much do you trust British governments of any party to place the needs of the nation above the interests of their own political party (%almost always/most of the time, British Social Attitudes Survey); Which of these statements best describes your opinion on the current system of governing Britain? (% needs a great deal of improvement, Hansard Society Audit of Political Engagement)



# BREXIT HAS REVEALED DIVISIONS ON NOSTALGIA ...

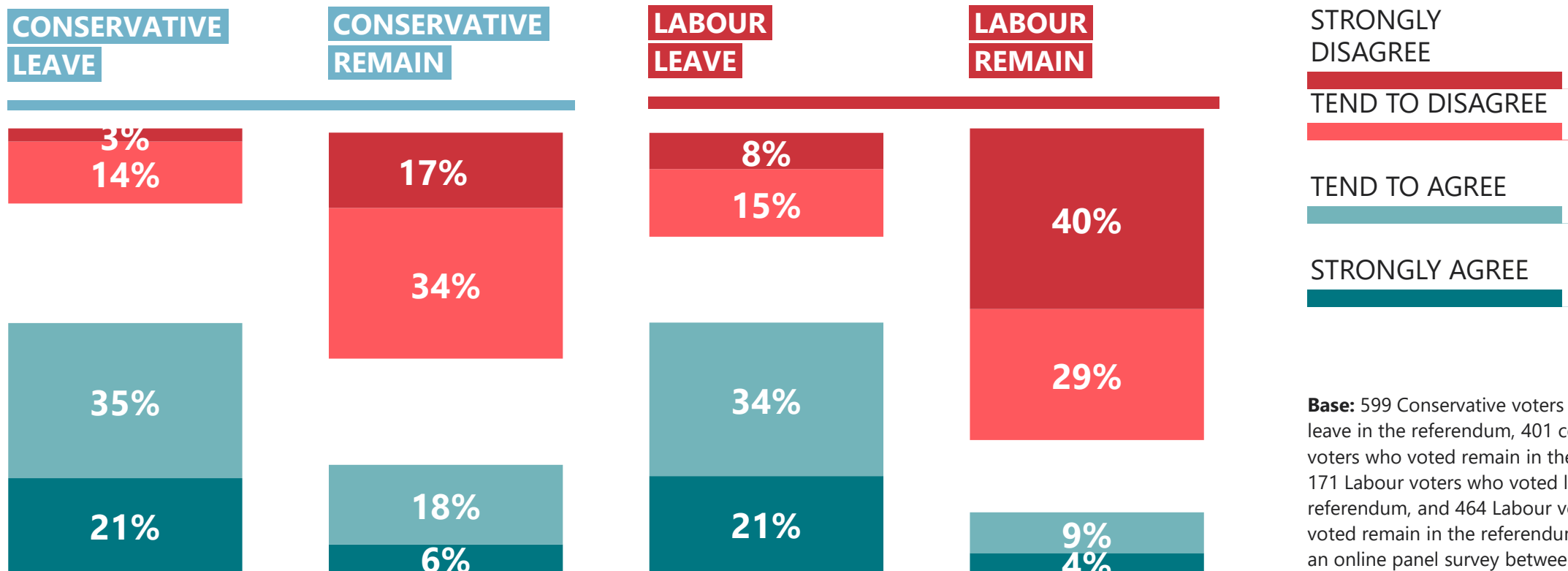
“Things in Britain were better in the past”



**Base:** 599 Conservative voters who voted leave in the referendum, 401 conservative voters who voted remain in the referendum, 171 Labour voters who voted leave in the referendum, and 464 Labour voters who voted remain in the referendum, completing an online panel survey between the 13-20th October 2016

# AND ON ATTITUDES TO IMMIGRATION ...

“Immigrants take away jobs from real Britons”

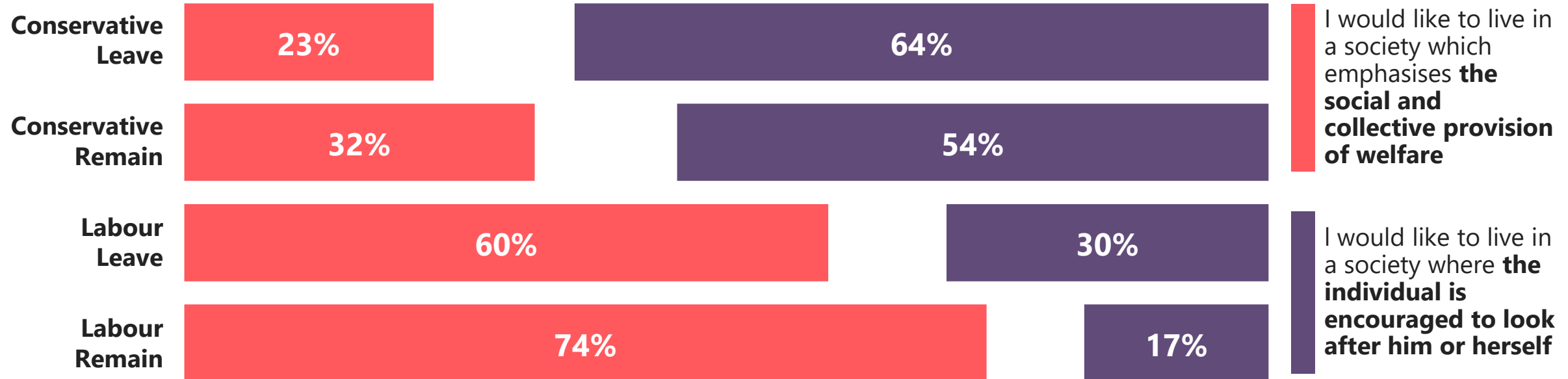


**Base:** 599 Conservative voters who voted leave in the referendum, 401 conservative voters who voted remain in the referendum, 171 Labour voters who voted leave in the referendum, and 464 Labour voters who voted remain in the referendum, completing an online panel survey between the 13-20th October 2016

**Source:** Ipsos MORI/Unbound

# AND DEEP IDEOLOGICAL DIVISIONS

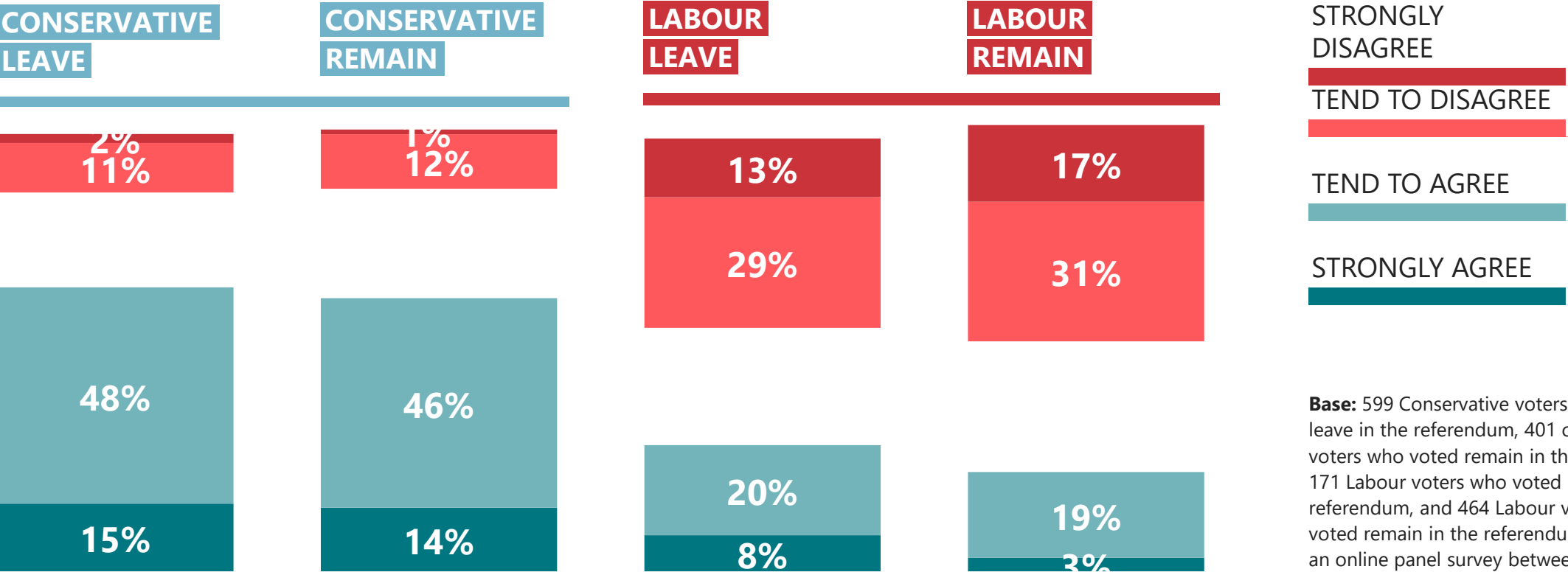
*Which of the following statements comes closest to your ideal?*



*+ political correctness, death penalty, gay marriage*

# BUT TRADITIONAL PARTY DIVIDES ALSO REMAIN

“Large differences in people’s incomes are acceptable to properly reward differences in talents & efforts”



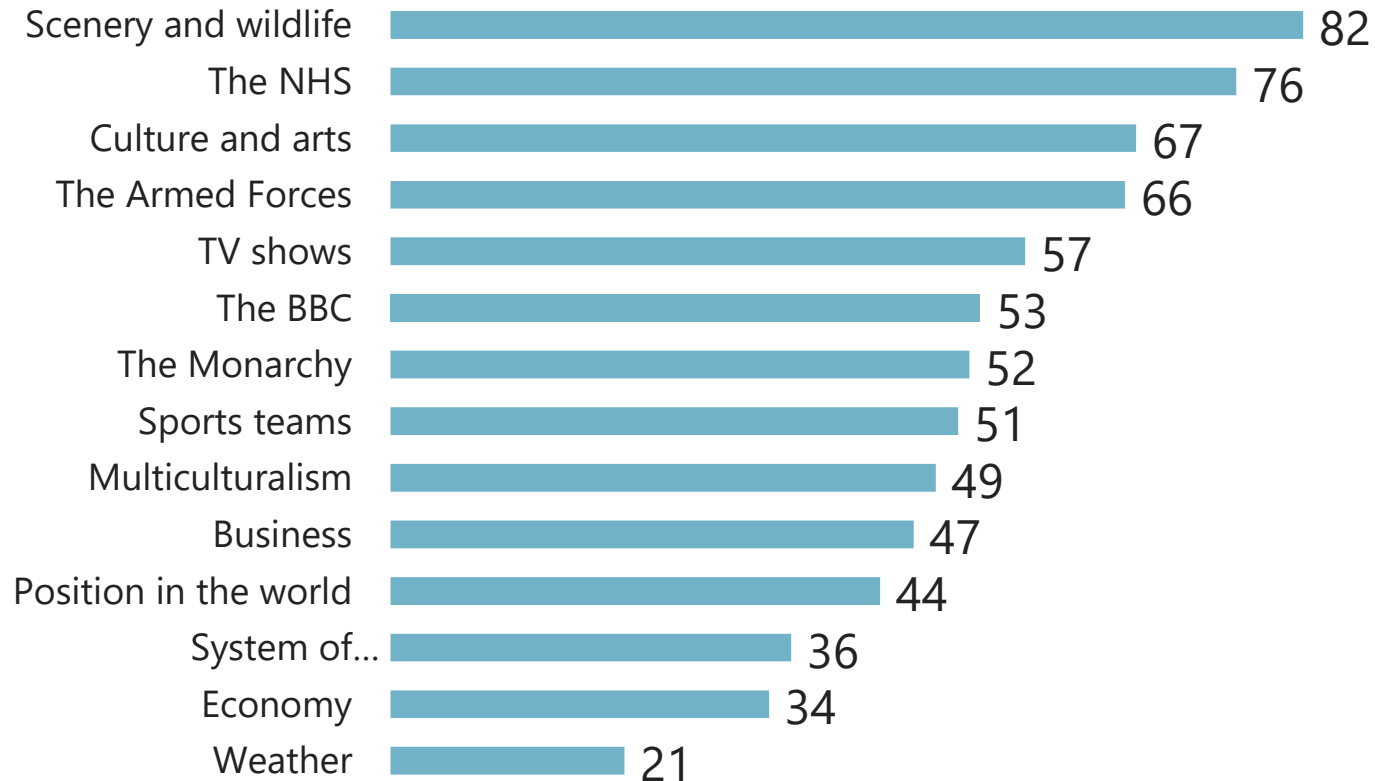
**Base:** 599 Conservative voters who voted leave in the referendum, 401 conservative voters who voted remain in the referendum, 171 Labour voters who voted leave in the referendum, and 464 Labour voters who voted remain in the referendum, completing an online panel survey between the 13-20th October 2016



But.....

# We're proud of our countryside, healthcare, and culture

***Below is a list of things that are part of life in the UK. To what extent, if at all, do you think each of these is something that the people of the UK should be proud of? % a great deal/fair amount***

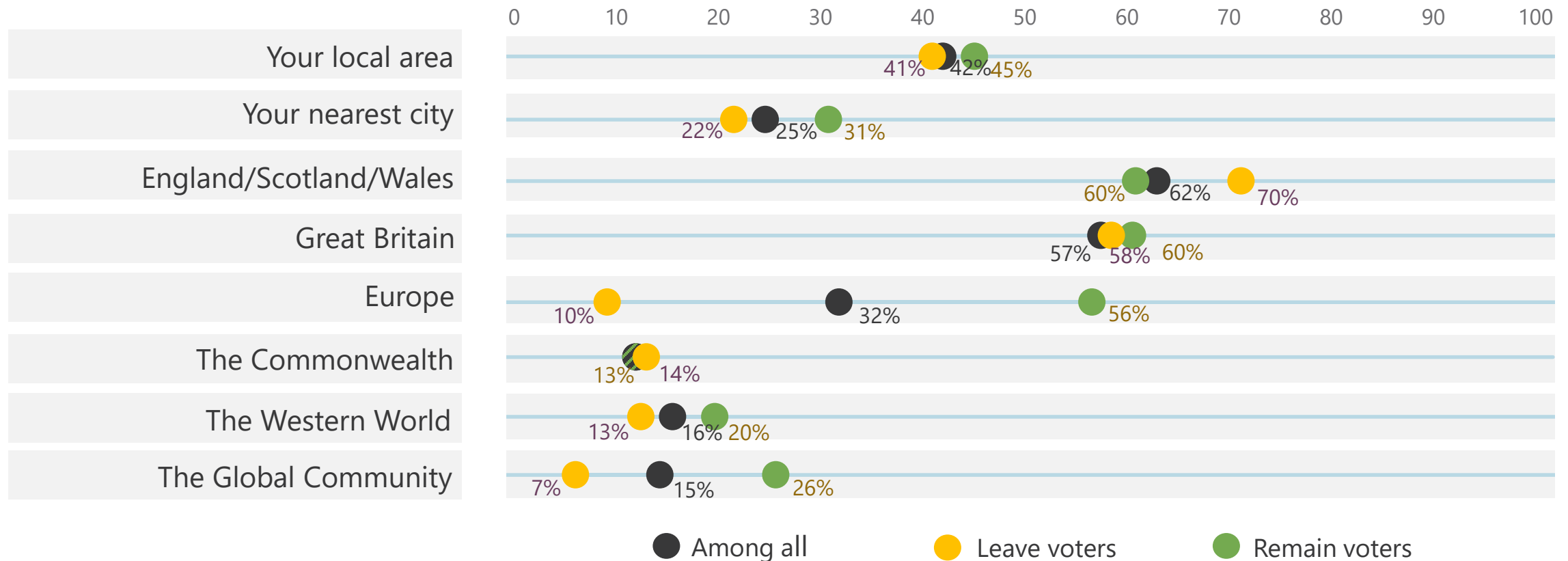


Base: 564 UK adults aged 16-75; 547 US adults aged 18-75; 547 Canadian adults aged 18-75. Interviewed online August 2017.

BBC / Ipsos MORI

# More unites us than divides us – not “anywhere” versus “somewhere”

WHICH OF THE FOLLOWING, IF ANY, DO YOU IDENTIFY WITH? PLEASE SELECT AS MANY AS RELEVANT.



Base: All adults aged 16-75 in Great Britain (1,100), adults aged 16-75 who voted Remain in 2016 EU Referendum (465), voted Leave (432), 5-9 April 2019.

**Key implication:**

A man in a blue jacket and a light-colored dog are sitting on a wooden bench in a misty, forested area. The man is wearing a blue jacket with a grey hood and grey pants. The dog is a light-colored breed, possibly a Weimaraner, with a dark collar. They are both looking away from the camera towards a misty background of trees and foliage. The scene is captured from behind them, emphasizing their shared perspective.

**Things are mostly not as bad as we think...**



An aerial photograph of a vast, rugged landscape. A deep, dark river valley runs diagonally from the upper center towards the lower right. The surrounding terrain is a mix of brown, tan, and green, showing signs of erosion and agricultural activity. The text is overlaid in the center-left area.

**Intersection of what is  
changing and what is fixed –  
we don't yet know how this  
will play out**



**But many of the same  
things still unite us**

**Traditional institutions  
and culture are more  
resilient than we think**



# Thank you!

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# Q&A

**GAME CHANGERS**

