

IPSOS CREDENTIALS



GAME CHANGERS



At Ipsos, we provide true understanding about...



SOCIETY.



MARKETS.



PEOPLE.

“Game Changers” – our tagline – summarises our ambition: we provide true understanding and make our changing world easier to navigate, so that our clients can make faster, smarter and bolder decisions.

FOUNDED IN FRANCE IN

1975



IPSOS IS THE
WORLD'S
LEADING
MARKET
RESEARCH
COMPANY



MORE THAN

18,000

EMPLOYEES





Greenbook
THE FUTURE OF INSIGHTS

Ipsos ranked

#1

**most innovative
insights & analytics
company in the world**

in the GRIT 2023 report



Fifth Consecutive Years

GRIT



2023

TOP 50





WE MAKE DIFFERENCE

Expertise and thought leadership:

Leading-edge advisory expertise and thought leadership, from the most innovative research company in the world

Research heritage:

A research heritage in insights, analytics and total customer understanding

Advanced technology:

Best-in-class platform solutions – mobile data collection, real-time online reporting and video feedback

Driving business impact

A focus on understanding your business questions and driving the case for change

Global/local footprint:

With offices in 90 countries, we're close to our clients and know their markets

Reputation and stability

We're a major, professional and established organisation.

**Leading
companies
come to Ipsos
to help them
drive brand
growth**

World's Top 10
CPG
companies

World's Top 10
RX
companies

World's Top 10
AUTO
manufacturers

World's Top 10
BEAUTY
companies

World's Top 5
OTC
companies

8 of the 10 world's largest
**RESTAURANT
CHAINS**

8 of the 10 world's largest
TECHNOLOGY
companies

7 of the Top 10
BREWERS

14 of the Top 20
FINANCIAL SERVICES

Half of the world's top **RETAILERS**

IPSOS IN VIETNAM

Ensuring quality data, delivering actionable insights and measuring our performance via client satisfaction score

IPSOS IN VIETNAM

Full-service agency

Capacity: 172 full-time staff

- Main office: HCMC & Hanoi
- Fieldwork office: Danang & Can Tho

Quantitative Interviews (2022)

183,000 +

Qualitative Interview (2022)

300+ In-depth Interviews

130+ Focus Group Discussions

500+ Online Community Engagement

Online research: ~30%



2023 YTD CSM: 9.1

As a global Ipsos mandate, satisfaction surveys are sent at the end of every completed project and is a key measure of our everyday performance.

Specialization to offer comprehensive solutions

- Innovation
- Market Strategy & Understanding
- Brand Health Tracking
- Customer Experience
- Healthcare
- Qualitative (IUU)
- Strategy3
- Creative Excellence
- Channel Performance
- Ipsos.Digital (online DIY research)

Strong Employee & Client Satisfaction

Employee Engagement Score: 90%

How we manage quality of data collection?

Using **iField** - Ipsos' unique CAPI platform of collecting data – which delivers security, simplicity, speed and substance



Quality Assurance

Bound by the industry's most stringent quality standards



Ipsos was the first company in the world to gain **ISO 20252:2019** accreditation. ISO20252 sets out requirements for a quality management system and covers the management and delivery of research from executable elements such as research proposals, designing questionnaires and discussion guides, sampling and data processing, and archiving documents. Of particular importance is the incorporation of IQCS (**Interviewer Quality Control Scheme**) in this standard.



Ipsos is a member of ESOMAR, with an agreement to abide by the ICC/ESOMAR International Code on Market and Social Research.

[Download ICC/ESOMAR Int'l Code Document here.](#)

All Ipsos offices and fieldwork partners are bound by the same strict quality standards and practices for both Online and Offline Research. Both internal and external audits are done annually.

Ipsos Market Strategy & Understanding

Leveraging our expertise on a consumer-centric perspective and supported by data science

We have developed new and unique approaches to meet our clients' evolving needs

DEMAND SPACE

Develop actionable segments based on a mix of occasions / needs / people variables to predict brand/product choice



MICRO-TARGETING

Targeted segmentation linked to data bases (DMP, CRM, ...) aimed at media- planning or customer relations.

SLICE

A module for cost-effective and fast needs segmentation that can be added to any study (e.g., U&As, brand studies).



Ipsos MSU delivers insights that address strategic business questions related to markets, brands and shoppers



Markets



Brands



Shoppers

Market Strategy & Understanding

Our agile solutions and business expertise can help you...

Become a 'consumer conscious' organization by capturing real people in real life and using virtual environments to replicate omnichannel shopping behavior

Stay ahead of your competition

by using behavioral science to understand how people think and behave today – and predict what they will do tomorrow

Make decisions with precision and confidence

by leveraging our combination of research expertise and consulting experience



Ipsos Channel Performance

to improve performance across all sales and service channels – **physical, contact centre, and digital** – and help deliver profitable growth

UNDERSTAND

MEASURE

 Channel Sizing	 Shopper Insights	 Activation Testing	 Execution Measurement	 Mystery Shopping
<p>Determine channel size, distribution opportunities, and share by category and brand</p>	<p>Understand shopper types, motivations, behaviours, journeys, missions, decisions and touchpoints</p>	<p>Evaluate shopper interactions and test tactics in virtual and physical environments</p>	<p>Ensure the right products, services, pricing, and promotion in the right place, at the right time</p>	<p>Measure delivery of brand and customer experience promises across every touchpoint</p>
<p>... to inform channel strategies</p>	<p>... to optimise marketing ROI</p>	<p>... to win at the point of purchase</p>	<p>... to ensure compliance</p>	<p>... to drive the right customer behaviours</p>

End-to-end insights solutions that **DRIVE** sales conversion across channels

Ipsos INNOVATION

We navigate every phase of Innovation Journey by providing strategic e2e consult that's inspired by consumers, underpinned by behavioral context, and accelerated by technology.



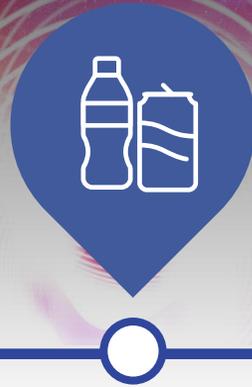
INNOVATION ADVISORY

Early-stage innovation consult incl. opportunity sizing to select most promising opportunities



INNOVATION SCREENING & VALIDATION

Idea and concept development, screening & validation



PRODUCT EVALUATION

Product screening, testing and post-launch optimization



PACK & SHELF EVALUATION

Early pack development and final pack/planogram validation



FORECASTING & VALIDATION

Assess size of prize and simulate scenarios

IPSOS.DIGITAL

Innovation tools are available for simple stimulus, idea and concept testing. You can opt for complete DIY, or researcher assisted access

SECURITY
SIMPLICITY
SPEED
SUBSTANCE

 <https://www.ipsos.digital/>



InnoTest



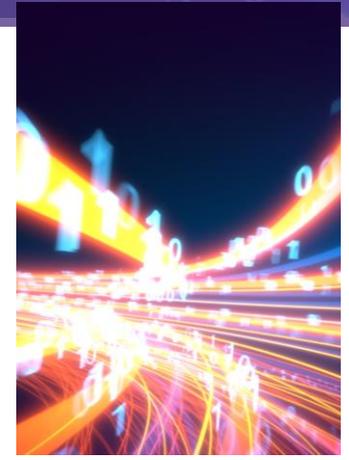
Duel



Creative|Spark



**Creative|Spark
Digital**



FastFact

Ipsos Qualitative Solutions

We differentiate by our specific angle: less on the 'what' (people do/prefer), **More** on the 'why' at exploration stages and the 'how' at optimisation/activation **stage**



CURATION

Curation is a service to provide consumer centric insights that address key business issues by synthesizing and contextualizing multiple data sources and delivering rich story- telling to inspire activation.



CENSYDIAM

Censydiam unlocks the path to creating relevant and meaningful brands.

It identifies the drivers of brand growth by connecting brands to people's needs and motivations (optimizing brand positioning, portfolio, and growth opportunities,...)



EMPATHY PROGRAM

Empathy is essential.

As a powerful tool for growing businesses, brands and organizations, empathy requires a complete circuit – from your head (the business question), to your heart (the people question),

to your gut (intuitive understanding), and to

your hands and feet (motivated action)



WORKSHOP

Insights-for-Impact workshops Ipsos UU facilitates immerse our client into people's stories, brings the research to life, and enables clients to distill insights that really matter to the consumer to develop winning innovation ideas, to position the brand against those insights, or to develop or identify communication ideas.



Other Services

- Focus groups
- Immersions (IHV)
- Ethnography
- Co-creation
- Shop-along with Tobbi glass
- Creative Ad Labs
- Censydiam Metaphor
- Customer Experience
- Journey Path Finder

Ipsos **Online** Qualitative Solutions

There are multiple solutions available to Ipsos that enable **digital engagement** with consumers, some of which are highlighted below

We have developed new and unique approaches to meet our clients' evolving needs



DIGITAL COMMUNITY



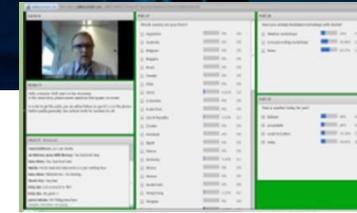
VIDEO GROUP INTERVIEWS



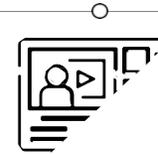
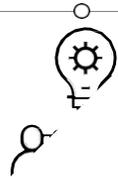
DIGITAL DIARIES



CO-BROWSING SESSIONS



ONLINE WORKSHOPS



Are researchers **equipped** for this?

Yes. Trained, experienced and ready.

The research team is up to date through pre-emptive trainings on the several tools – A direction we have been moving in since past couple of years in markets across the region.

From a qualitative perspective, the principles of research, analysis and interpretation of the consumer data remains same irrespective of the way the data has been collected.

Ipsos Social Intelligence and Analytics

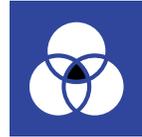
Integrating the best social media listening technology, the latest **advancements** in data science and dedicated analytical frameworks to provide actionable insights from vast amounts of unstructured data

Addressing Your Business Questions



MARKET EXPLORER

A comprehensive landscape mapping of motivations, attitudes, needs and habits that drive consumer behaviors, preferences and decisions in your category.



INNOVATION SPACES

Uncover new innovation spaces and unlock future growth territories from emerging unmet consumer needs and lead user innovations.



TREND RADAR

A consumer-led trend approach designed to deliver critical insights on change drivers and foresight the future impact of macro and micro trends in your category.



BRAND SONAR

Authentic and context rich brand and campaign performance insights designed to surface critical emotions, brand experiences and distinctive brand associations.



PRODUCT INTELLIGENCE W/ RATINGS & REVIEWS

Unlock your full potential with in-context product performance insights and the critical satisfaction driving product features from unfiltered consumer reviews.



DIGITAL PERSONAS

A new era of audience insights on lifestyle patterns, interests, digital touchpoints or media habits through a unique behavioral and conversational data ecosystem.

Ipsos Brand Health and Communication Tracking

We believe there are 3 key factors that impact Brand Growth & these form the bases of our approach to measure Brand Performance

A neat summary of the strategies a brand can use to ensure brand growth and be first at the moment of choice.



MAKE IT EASY TO CHOOSE:

Manage the factors that make it easy to choose the brand we desire or push us towards alternatives

This is about managing **MARKET FORCES**: enabling your brand to be chosen easily at the moment of choice



MORE
PEOPLE



MORE
EASILY



MORE
OFTEN



BUILD SALIENCY: Identify and enhance prominent memory and attention cues so that your brand is implicitly retrieved in the moments of choice



FORM RELATIONSHIPS: Meet functional and emotional needs across multiple occasions to create memories that link the brand and things that matter



RANK FIRST: Achieve highest perceived value at the moment of choice

Together, these elements create **BRAND DESIRE** which reflects the extent to which people want to buy your brand

Ipsos' Brand Value Creator

Brands grow when they are chosen by more people, for more products and more easily

A neat summary of the strategies a brand can use to ensure brand growth and be first at the moment of choice.



Brand Desire

It is important for brands to be perceived as an easy, available choice:

These are the factors which make it easy for consumers to choose the brand they desire, or alternatively, that get in the way and push them to an alternative choice.

+/-



Market Effects

This is about building strong mental networks for the brand:

Strengthening brand saliency and brand relationships to ensure the brand ranks first in as many choice situations as possible.

=



Effective Equity

The outcome of both Brand Desire and Market Effects:

Understanding what people actually do. So, you know that the decisions you make will have an impact on your business.

Customer Experience at Ipsos

We support our clients on their CX Journey towards building a truly customer-centric culture

ENGAGE



Helping your organisation **engage** around a common CX vision – from C-suite to frontline

- CX Maturity
- CX Measurement Audit
- CX Tech Review
- CX Journey

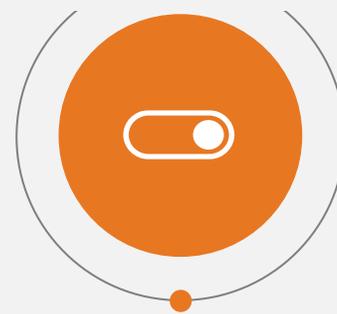
LISTEN



Listening to the 'Voice of your Customers' – across all touchpoints and channels. Creating a single source of customer truth

- CX Relationship Management + CX Forces
- Brand CX Forces
- CX Transactional Management + CX Forces
- CX Rewards Optimiser
- CX Social
- CX Communities
- CX Lens

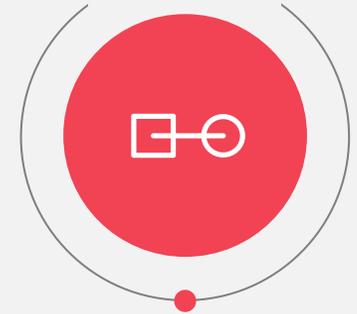
ACTIVATE



Activating what needs to be done to ensure your CX delivers on your Brand Promise

- ROCXI/Financial Linkage
- Key Driver Analysis
- Text Analytics
- Data Integration
- CX Closed Loop

EMBED



Embedding the structure and culture to drive continuous CX improvement and customer centricity

- CX Activation Workshops
- CX:EX
- CX Master Series
- CX Target Setting
- CX Maturity Roadmap
- CX Service Design

ROCXI IS AT THE HEART OF BOTH OUR OFFER AND ALL OUR ENGAGEMENTS

Retention
Customers are retained and at-risk customers are recovered



Share of Spend
Customers choose you more often



Advocacy
Customers share their positive experiences with others



Operational Efficiency
Customers are served in a quality-driven, cost-effective way



ROCXI

THE FORCES OF CX

The science of strong relationships



Fair Treatment

Make customers feel that there is a fair exchange in their relationship with you



Certainty

Make customers feel that things are clear, transparent and working as expected



Control

Help customers feel in control of the situation and in the driving seat



Status

Make customers feel valued, respected and worthy of special treatment



Belonging

Help customers feel a sense of belonging and show you care about the greater good



Enjoyment

Make customers' lives easier, so they feel a sense of freedom



THE CX MATURITY ASSESSMENT

Client testimonial

Tập đoàn đa ngành TNG Holdings Vietnam vừa được gọi tên ở hạng mục "Doanh nghiệp xuất sắc châu Á" (Corporate Excellence) của giải thưởng quốc tế Asia Pacific Enterprise Awards (APEA) 2023.



[TNG Holdings Vietnam 3 lần liên tiếp nhận giải Doanh nghiệp xuất sắc châu Á - Tuổi Trẻ Online \(tuoitre.vn\)](https://tuoitre.vn)



Dưới sự tư vấn của Ipsos - công ty nghiên cứu thị trường hàng đầu thế giới, TNG Holdings Vietnam đã triển khai mô hình "Trưởng thành về trải nghiệm khách hàng" để đánh giá các điểm chạm tại các công ty thành viên.

Từ đó, tập đoàn đã từng bước xây dựng bức tranh tổng thể về lộ trình triển khai trải nghiệm khách hàng trong giai đoạn 3 năm và 5 năm.

Theo đó, các nền tảng thu thập ý kiến khách hàng, xây dựng hành trình điểm chạm (offline và online) được chuẩn hóa.

Tính tới thời điểm hiện tại, TNG Holdings Vietnam là một trong số ít tập đoàn đa ngành tại Việt Nam xây dựng và bước đầu ra mắt thành công hệ thống nền tảng dữ liệu khách hàng của riêng mình.

Ipsos Strategy 3

It is the specialist division of Ipsos that has been helping companies build, compete and grow by addressing a wide range of issues in the **business-to-business** arena for **last twenty** years.



World's Best Management Consulting Firms List 2022 by Forbes

Strategy3 is Ipsos' business and growth advisory firm

We believe that in order for any business strategy, marketing plan, brand positioning, or new innovation to be successful, it must do **three** things: be rooted in the organization's strategy, be informed and inspired by customer research, and it must drive through to actual in-market activation. While there are many firms that advise on growth, very few deliver on all **three**: traditional management consultancies rarely delve deep enough into the world of the customer; creative firms don't truly leverage the power of data; research agencies can sometimes lose the big picture in the midst of analysis. That's why we are Strategy**3**.

We approach every challenge through **three** lenses



IPSOS' VALUE ACROSS THE LIFE CYCLE

Phase I/II/Acquisition

Phase III

Phase IV/In Market

Pharma

Should we invest resources?

- Trials
- Acquisitions

Where should we place our bets?

- (Sub) Indications
- Therapeutic Areas

How should we launch?

- ★ Who are our key targets?
- ★ What is the best thing to say about our product to change hearts and minds?
- ★ What channels are optimal?

Are the strategy and tactics working as planned?

- ★ Monitor the competitive environment.
- ★ Are course corrections needed?

Patient Journey / Patient Flow / Buying Process

Healthcare

Commercial Strategy

- ★ Demand Estimation
- Market Landscape Definition
- ★ Forecasting
- Market Simulation
- ★ Pricing and Access
- Pipeline Assessment
- Portfolio Planning



Launch Excellence

- ★ Concept Dev. and Testing
- Segmentation
- Market Mapping
- ★ Positioning
- Pharmacoeconomic Value
- Ad Dev. And Testing
- ★ Channel Selection



Performance Optimization

- ★ Brand Equity Tracking
- ★ Sales Force Effectiveness
- ★ Message Recall
- ★ Channel Optimization
- ★ Patient Compliance and Support Program Evaluation
- LoE Planning
- ★ Indication Extension Evaluation



We are uniquely structured to meet your needs

ADDRESSING YOUR BUSINESS QUESTIONS ACROSS THE PRODUCT LIFE CYCLE



OUR SERVICES

CUSTOM

Answering key business questions **across the product lifecycle** (Commercial Strategy, Launch Excellence and Performance Optimisation)

SYNDICATED

Comprising our **Syndicated Global Real-World Evidence** as well as **other syndicated solutions** which are utilised by clients to answer business questions

MARKET ACCESS & HEOR

Answering our clients' questions about strategies to ensure the greatest **access & value for their products** based on an understanding of **value and health economics**

ADVISORY SERVICES

Guiding our clients' strategic decisions through **insight, research and analytics**, across the product lifecycle



OUR CENTRES OF EXPERTISE

PRODUCT LIFECYCLE

- Commercial Strategy
- Launch Excellence
- Performance Optimisation
- Payer Marketing & Market Access
- Medical & HEOR Strategy

THERAPY INSIGHTS

- Oncology
- Autoimmune
- Vaccines/Virology/Liver Diseases
- Rare Diseases
- Diabetes, Obesity & CV
- Respiratory

MARKET KNOWLEDGE

- Biopharma Industry
- Compliance
- Multi-Stakeholder Access/ Engagement
- Medical Devices & Diagnostics
- Connected Health
- Patient & Consumer Health
- Animal Health

INNOVATIVE SOLUTIONS

- Data Science & Advanced Analytics
- Multi-source Data Solutions
- Digital Innovation/Social Intelligence/AI
- Qualitative Observation & Activation
- Behavioural Science
- Syndicated Real World Data & Norms



OUR NETWORKS

1,000+ HEALTHCARE EXPERTS

50+ COUNTRIES

GLOBAL COMPLIANCE

CLIENT ENGAGEMENT PROGRAMMES

CONSUMER INNOVATIONS

IPSOS IN VIETNAM

Key clients across industries....





After completion of every research project, we ask for direct client feedback. The feedback is reviewed by respective Global Service Line Leaders and Vietnam Managing Director.

Overall Satisfaction Score is rated on a scale of 1-10 with 10 being 'extremely satisfied'. Any feedback with score lower than 6 must have improvement actions within 24 hours and reported back.

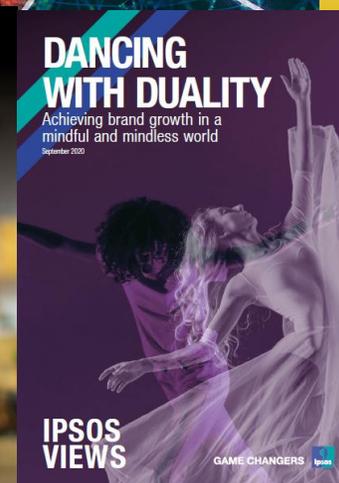
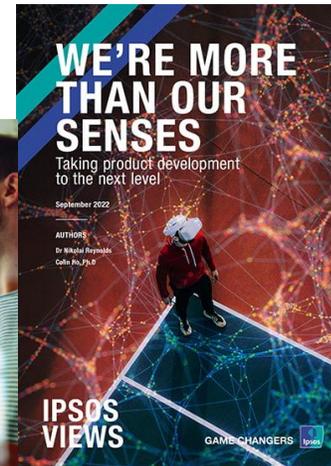
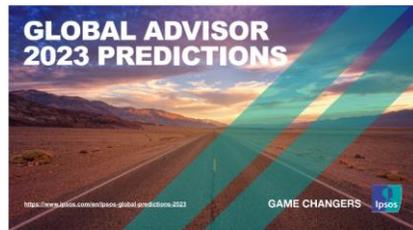
CSM Score:

2022: 8.6

2023 (YTD): 9.1

Ipsos Thinks

We offer industry leading thought leadership



About Ipsos

Ipsos is the third largest market research company in the world, present in 90 markets and employing more than 18,000 people.

Our research professionals, analysts and scientists have built unique multi-specialist capabilities that provide powerful insights into the actions, opinions and motivations of citizens, consumers, patients, customers or employees. Our 75 business solutions are based on primary data coming from our surveys, social media monitoring, and qualitative or observational techniques.

“Game Changers” – our tagline – summarises our ambition to help our 5,000 clients to navigate more easily our deeply changing world.

Founded in France in 1975, Ipsos is listed on the Euronext Paris since July 1st, 1999. The company is part of the SBF 120 and the Mid-60 index and is eligible for the Deferred Settlement Service (SRD).

ISIN code FR0000073298, Reuters ISOS.PA, Bloomberg IPS:FP
www.ipsos.com/en-vn

Game Changers

In our world of rapid change, the need for reliable information to make confident decisions has never been greater.

At Ipsos we believe our clients need more than a data supplier, they need a partner who can produce accurate and relevant information and turn it into actionable truth.

This is why our passionately curious experts not only provide the most precise measurement, but shape it to provide True Understanding of Society, Markets and People.

To do this we use the best of science, technology and know-how and apply the principles of security, simplicity, speed and substance to everything we do.

So that our clients can act faster, smarter and bolder. Ultimately, success comes down to a simple truth:
You act better when you are sure.

THANK YOU.

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