

# DATA-LED PLACE BRAND STRATEGY

## Part 2: Driving Strategy with Real-Time Insight & Analytics

---

Jason McGrath – Ipsos

November 7, 2019

© 2019 Ipsos. All rights reserved. Contains Ipsos' Confidential and Proprietary information and may not be disclosed or reproduced without the prior written consent of Ipsos.



# AGENDA

1. What is the current sentiment towards the UK?
2. How do we monitor in real-time?
3. How are the insights used?

# Brexit – Significant Global Uncertainty

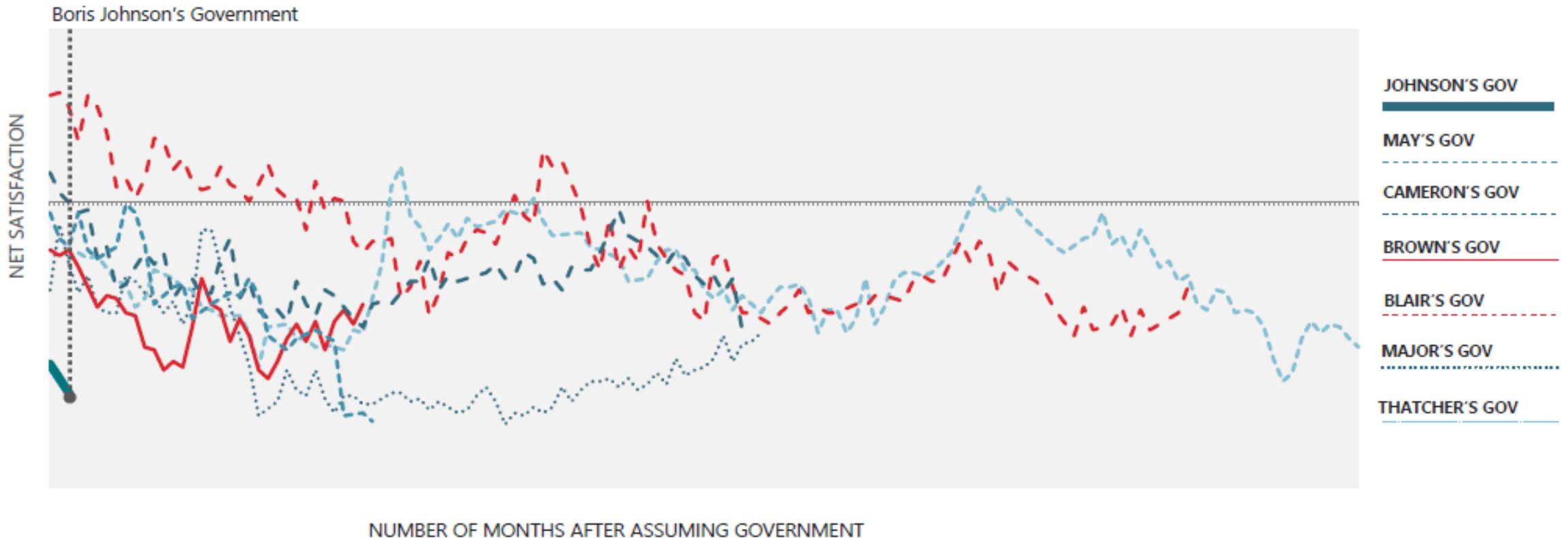
Sentiment dropped immediately post-Brexit, rebounded in some markets but remains slightly depressed in others

|                      | 2014  |      | 2015  |      | 2016  |      | 2017  |      | 2018  |      |
|----------------------|-------|------|-------|------|-------|------|-------|------|-------|------|
|                      | Score | Rank |
| <b>Australia</b>     | 70.27 | 2    | 71.31 | 2    | 69.19 | 2    | 69.48 | 2    | 68.35 | 4    |
| <b>Canada</b>        | 68.48 | 5    | 68.24 | 3    | 67.87 | 4    | 67.23 | 6    | 67.7  | 2    |
| <b>France</b>        | 64.15 | 5    | 65.45 | 4    | 61.76 | 9    | 63.96 | 5    | 64.14 | 4    |
| <b>Germany</b>       | 64.36 | 9    | 67.33 | 6    | 66.1  | 7    | 65.58 | 10   | 64.23 | 11   |
| <b>Italy</b>         | 68.59 | 2    | 69.19 | 3    | 67.47 | 3    | 67.87 | 2    | 67.33 | 2    |
| <b>Poland</b>        | 70.12 | 2    | 69.12 | 4    | 66.7  | 6    | 66.95 | 2    | 67.67 | 3    |
| <b>Sweden</b>        | 68.64 | 2    | 67.86 | 2    | 65.98 | 3    | 67.32 | 4    | 66.44 | 4    |
| <b>United States</b> | 67.72 | 3    | 68.15 | 2    | 65.68 | 4    | 69.78 | 3    | 69.01 | 2    |

# Lowest Beginning Satisfaction with Prime Minister in 40 Years

## Net satisfaction with the Government (1979 – 2019)

HOW SATISFIED OR DISSATISFIED ARE YOU WITH THE WAY THE GOVERNMENT IS RUNNING THE COUNTRY?



Note: Data collected prior to February 2008 was collected via face-to-face methodology; data collected from February 2008 was via telephone

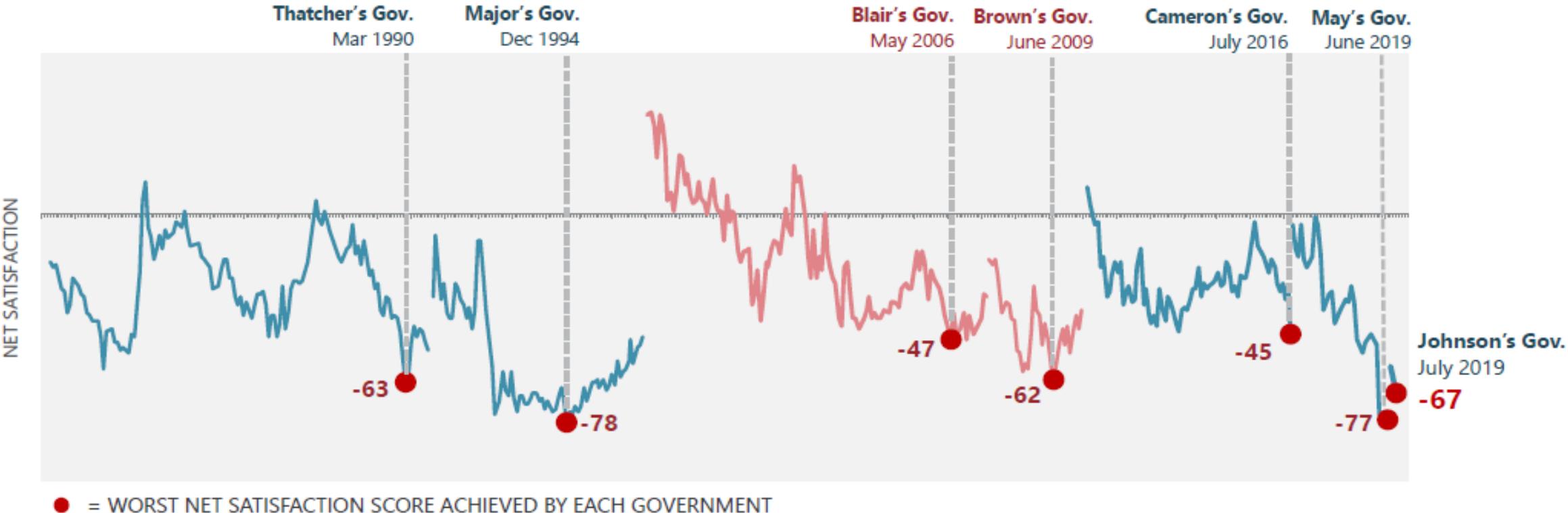
Base: c.1,000 British adults each month

Source: Ipsos MORI Political Monitor

# 8-in-10 Dissatisfied with Government Running Country

## Net satisfaction with the Government (1979 – 2019)

HOW SATISFIED OR DISSATISFIED ARE YOU WITH THE WAY THE GOVERNMENT IS RUNNING THE COUNTRY?



Note: Data collected prior to February 2008 was collected via face-to-face methodology; data collected from February 2008 was via telephone

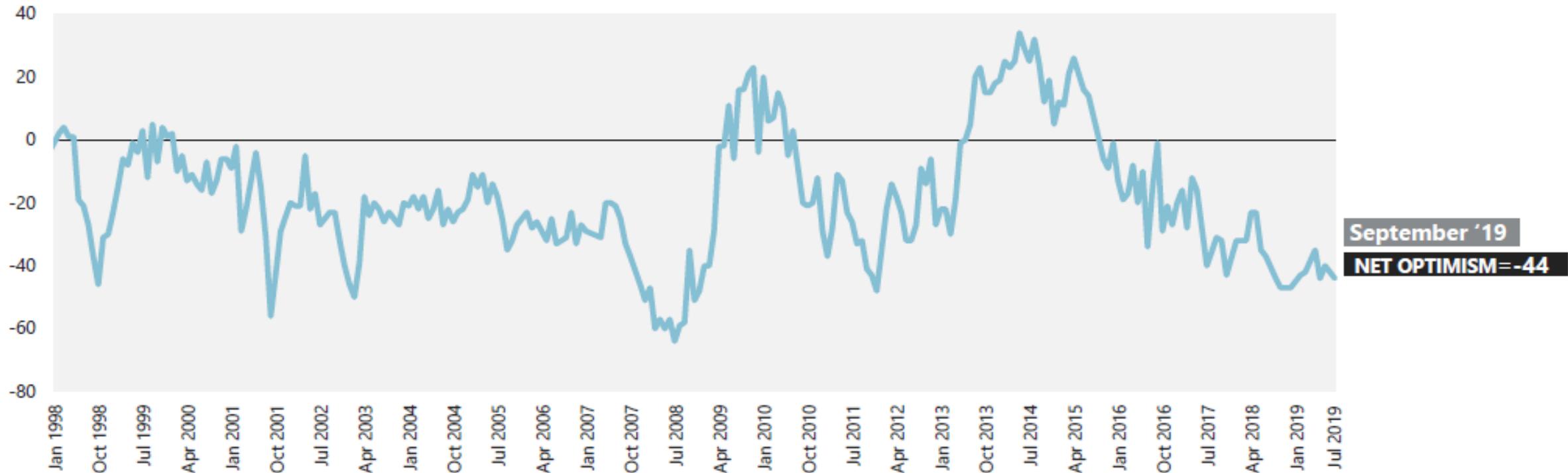
Base: c.1,000 British adults each month

Source: Ipsos MORI Political Monitor

# Economic Optimism As Low As Prior Recessions

## Economic Optimism Index – 1998-2019

DO YOU THINK THAT THE GENERAL ECONOMIC CONDITION OF THE COUNTRY WILL IMPROVE, STAY THE SAME OR GET WORSE OVER THE NEXT 12 MONTHS?



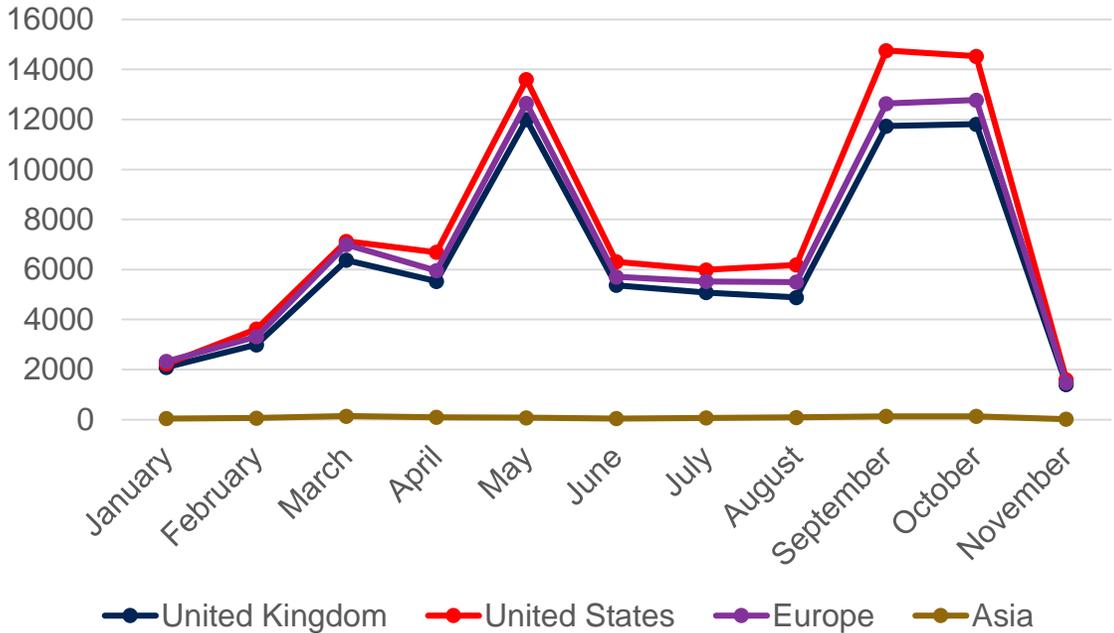
Base: c.1,000 British adults each month

Source: Ipsos MORI Political Monitor

# Volume of Global Conversation Peaks Around Key Issues

## 2019 Global Volume of Mentions

Volume of Brexit Mentions from 1/1/19 to 11/5/19



### Key Takeaways:

Conversations surrounding Brexit peaked in May, September, and October. All of these months focused on Brexit withdrawal agreements with the EU.

The mentions mainly focused on the withdrawal deal with the EU, as well as the American and EU elections.

Expect another increase as the new January 31<sup>st</sup> deadline approaches.

Source: Brandwatch, 2019



# UK Social Insights

## United Kingdom

| Topic     | Type     | Sentiment | Mentions |
|-----------|----------|-----------|----------|
| EU        | Org.     | Neutral   | 13,892   |
| people    | Keyword  | Neutral   | 9,156    |
| Brexiters | Person   | Neutral   | 8,417    |
| leave     | Keyword  | Neutral   | 7,601    |
| UK        | Location | Neutral   | 7,508    |
| Brexiters | Keyword  | Neutral   | 6,860    |
| Brexit    | Person   | Neutral   | 5,803    |
| vote      | Keyword  | Neutral   | 5,742    |
| deal      | Keyword  | Neutral   | 5,411    |
| time      | Keyword  | Neutral   | 5,384    |

Source: Brandwatch, 2019

### Key Takeaways:

Many British people are discussing Brexit itself and the politics surrounding it.

Sentiment is fairly neutral, but digging deeper shows the polarization of the issue resulting in net neutral results.

A majority of people discussing Brexit in the UK were male, as they made up 70% of the total Brexit conversation.

# US Social Insights

## United States

| Topic     | Type     | Sentiment | Mentions |
|-----------|----------|-----------|----------|
| EU        | Org.     | Neutral   | 16,488   |
| people    | Keyword  | Neutral   | 10,598   |
| Brexiters | Person   | Neutral   | 10,170   |
| UK        | Location | Neutral   | 8,929    |
| leave     | Keyword  | Neutral   | 8,799    |
| Brexiters | Person   | Neutral   | 8,188    |
| vote      | Keyword  | Neutral   | 6,740    |
| deal      | Keyword  | Neutral   | 6,329    |
| Brexiters | Person   | Neutral   | 6,214    |
| time      | Keyword  | Neutral   | 5,857    |

Source: Brandwatch, 2019

### Key Takeaways:

Politics was the top interest of people discussing Brexit in America, particularly with the American presidential elections on the horizon.

Total mentions were higher in America than in the UK, representing American concern over Brexit, but also the larger population base engaged on the issue.

# European Social Insights

## Europe

| Topic     | Type     | Sentiment | Mentions |
|-----------|----------|-----------|----------|
| EU        | Org.     | Neutral   | 15,142   |
| people    | Keyword  | Neutral   | 10,015   |
| Brexiters | Person   | Neutral   | 9,222    |
| UK        | Location | Neutral   | 8,416    |
| leave     | Keyword  | Neutral   | 8,190    |
| Brexiters | Keyword  | Neutral   | 7,790    |
| Brexiters | Person   | Neutral   | 6,321    |
| vote      | Keyword  | Neutral   | 6,147    |
| time      | Keyword  | Neutral   | 6,032    |
| deal      | Keyword  | Neutral   | 5,888    |

Source: Brandwatch, 2019

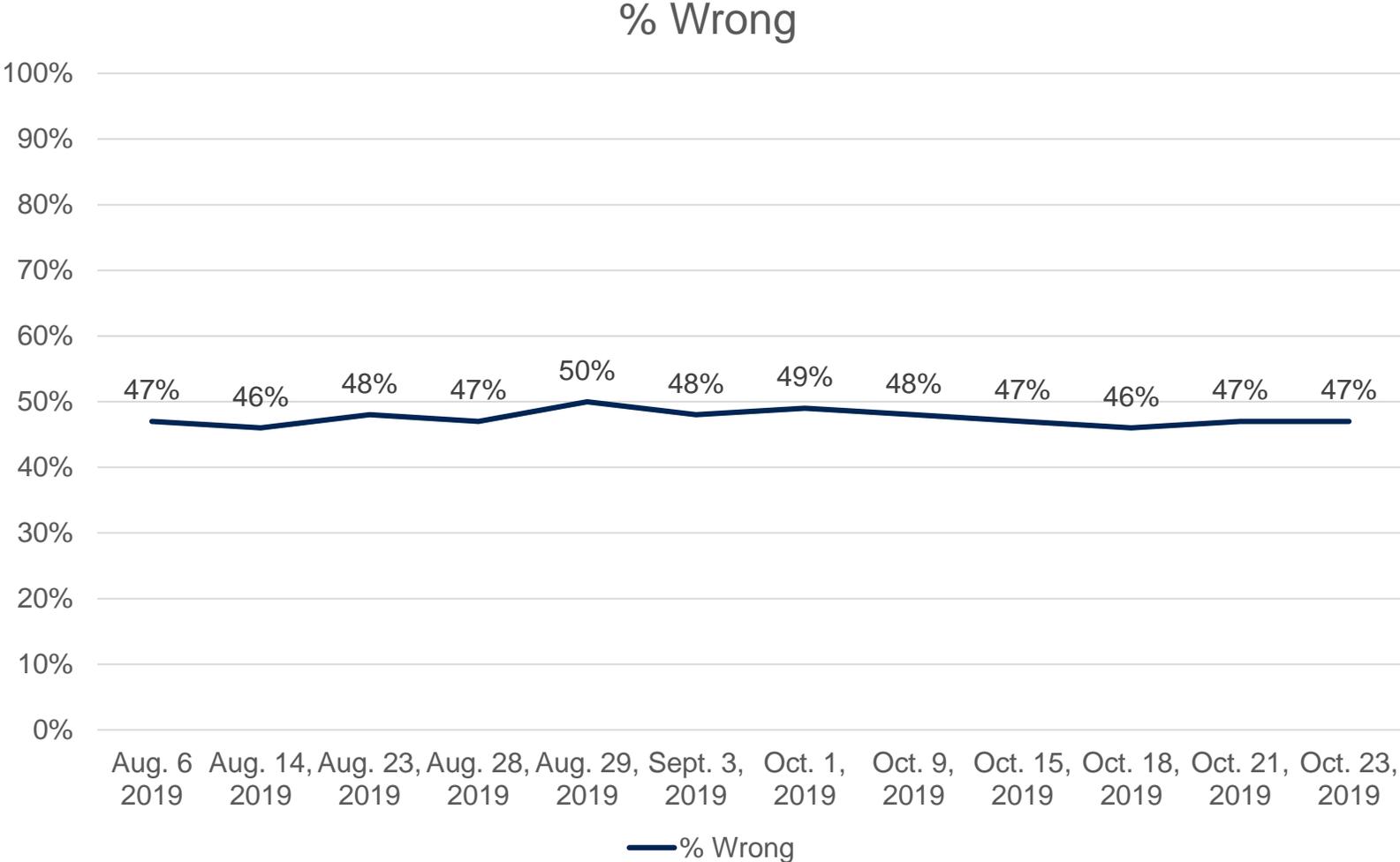
### Key Takeaways:

The major focus in Europe surrounding Brexit is the UK leaving the EU and the displacement of EU nationals within the UK.

Another major concern is the delay of an economic deal between the EU and the UK for trade.

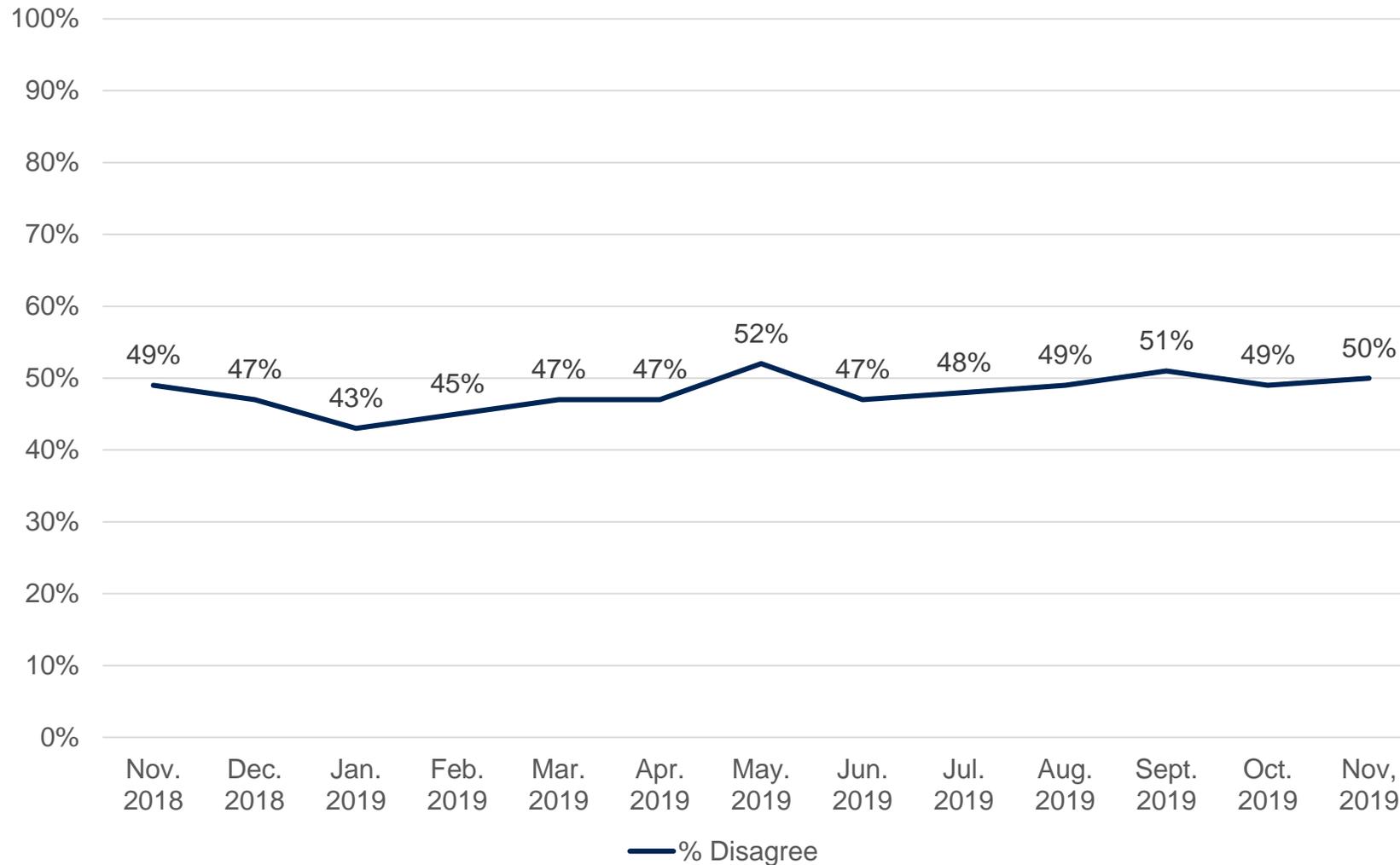
The major countries that are currently discussing Brexit include France, Germany, and the Republic of Ireland.

# Other Public Data Corroborates Our Own – More Believe Leaving is the Wrong Decision in Hindsight than Right



# UK Citizens Worried About Economic Impact

% Disagree



Source: ORB

Question: Do you agree or disagree that having more control over immigration is more important than having access to free trade with the EU?

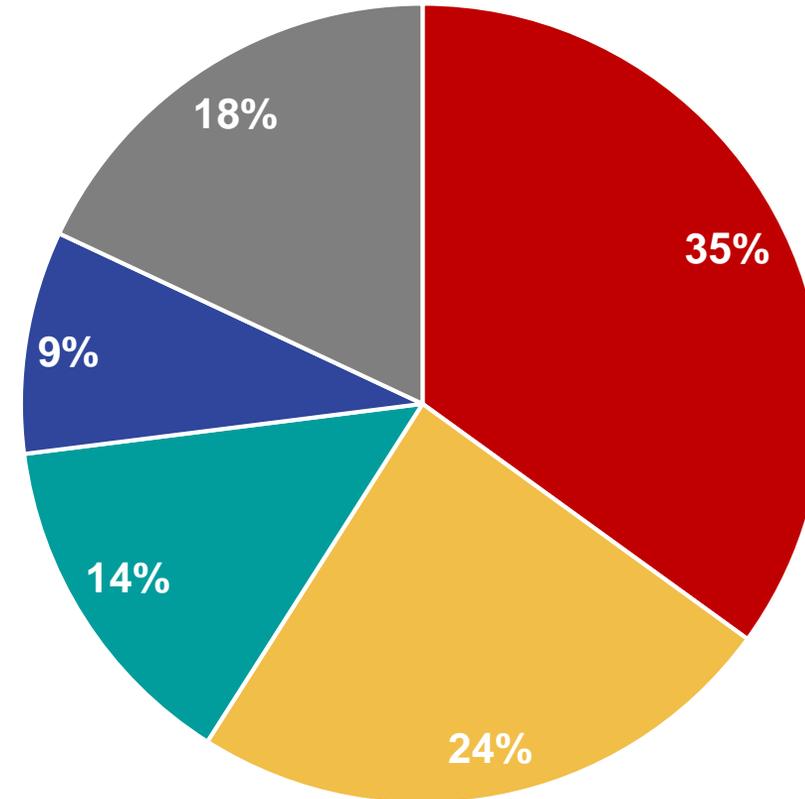
# Worry About Institutions Being Impacted By Future Trade Deals

Risk

## Full question wording

Labour have claimed that under the Conservatives a future trade deal with the US would require the NHS to allow US corporations to bid for NHS contracts and require the NHS to pay more for drugs. The Conservatives have said the NHS would not be part of any trade deals with the USA.

If a future government did do a trade deal with the USA, how much of a risk, if any, do you think it would post to the NHS?



■ A Big Risk ■ A Significant Risk ■ No Significant Risk ■ No Risk At All ■ Don't Know

# Recent data identifies the strain that Brexit is already starting to have on both inbound and outbound tourism for the UK...

UK Travel Growth (2015 – June 2019)

| Year-on-year growth | 2015 | 2016  | 2017 | 2018  | Jun-19 |
|---------------------|------|-------|------|-------|--------|
| Inbound Trips       | 5.1% | 4.1%  | 4.3% | -3.3% | -1.0%  |
| Inbound Spend       | 1.0% | 2.1%  | 8.7% | -6.6% | -2.0%  |
| Outbound Trips      | 9.4% | 7.8%  | 2.8% | -1.7% | -      |
| Outbound Spend      | 9.8% | 12.2% | 2.4% | 0.4%  | -      |
| Domestic Trips      | 8.9% | -3.9% | 1.0% | -1.8% | 2.0%   |
| Domestic Spend      | 9.4% | -7.0% | 2.6% | 1.2%  | 2.5%   |

Source: Skift Research from ONS Travepac and Great Britain Tourism Survey

- The Great Britain Tourism Survey (through June 2019) is indicating a **2% decline in trips compared to the same time last year**
- A spokesperson for VisitBritain, recently told Skift that its internal research indicated that **“the uncertainty that Brexit is having is creating declines in tourism in particular for visitors from the EU”**
- However, within the UK, **domestic trips are increasing**, which has also been indicated in other studies from organizations like Travel Ireland, etc.

Source: Skift Research

# UK data shows that tourism in 2018 was down...



Visitor spending in UK slumped by 7 per cent as EU tourists stayed away due to uncertainty

# And 2019 tourism is currently flat, with declines from EU countries.

|                  | July 2019 | % change vs Jul 18 | Last 3 months (May - Jul 19) | % change vs May - Jul 18 | Year to date (Jan - Jul 19) | % change vs Jan - Jul 18 |
|------------------|-----------|--------------------|------------------------------|--------------------------|-----------------------------|--------------------------|
| All visits (000) | 3,960     | +2%                | 10,770                       | +1%                      | 21,800                      | 0%                       |
| Spend (£m)       | £2,850    | +17%               | £7,250                       | +10%                     | £13,110                     | +1%                      |

|                    | Rolling 12 months (Aug 18 - Jul 19) | % change vs Aug 17- Jul 18 | When            | Benchmark to best ever rolling 12 months |
|--------------------|-------------------------------------|----------------------------|-----------------|--|
| Total visits (000) | 37,860                              | 0%                         | Sep 16 - Aug 17 | 39%                                      |
| Spend (£m)         | £23,070                             | -2%                        | Dec 16 - Nov 17 | £2.1bn                                   |

|                | Jul 2019 | % change vs Jul 18 | Last 3 months (may - Jul 19) | % change vs May - Jul 18 | Year to date (Jan - Jul 19) | %change vs Jan - Jul 18 |
|----------------|----------|--------------------|------------------------------|--------------------------|-----------------------------|-------------------------|
| EU Total       | 2,200    | -2%                | 6,250                        | -4%                      | 14,020                      | -2%                     |
| EU15           | 1,800    | -2%                | 5,030                        | -4%                      | 11,070                      | -3%                     |
| Other EU       | 400      | -5%                | 1,220                        | -5%                      | 2,940                       | +3%                     |
| Rest of Europe | 230      | +17%               | 620                          | +15%                     | 1,290                       | +7%                     |
| North America  | 710      | +2%                | 1,990                        | +17%                     | 3,100                       | +9%                     |
| Rest of World  | 830      | +10%               | 1,920                        | +3%                      | 3,390                       | -3%                     |

Source: VisitBritain.com

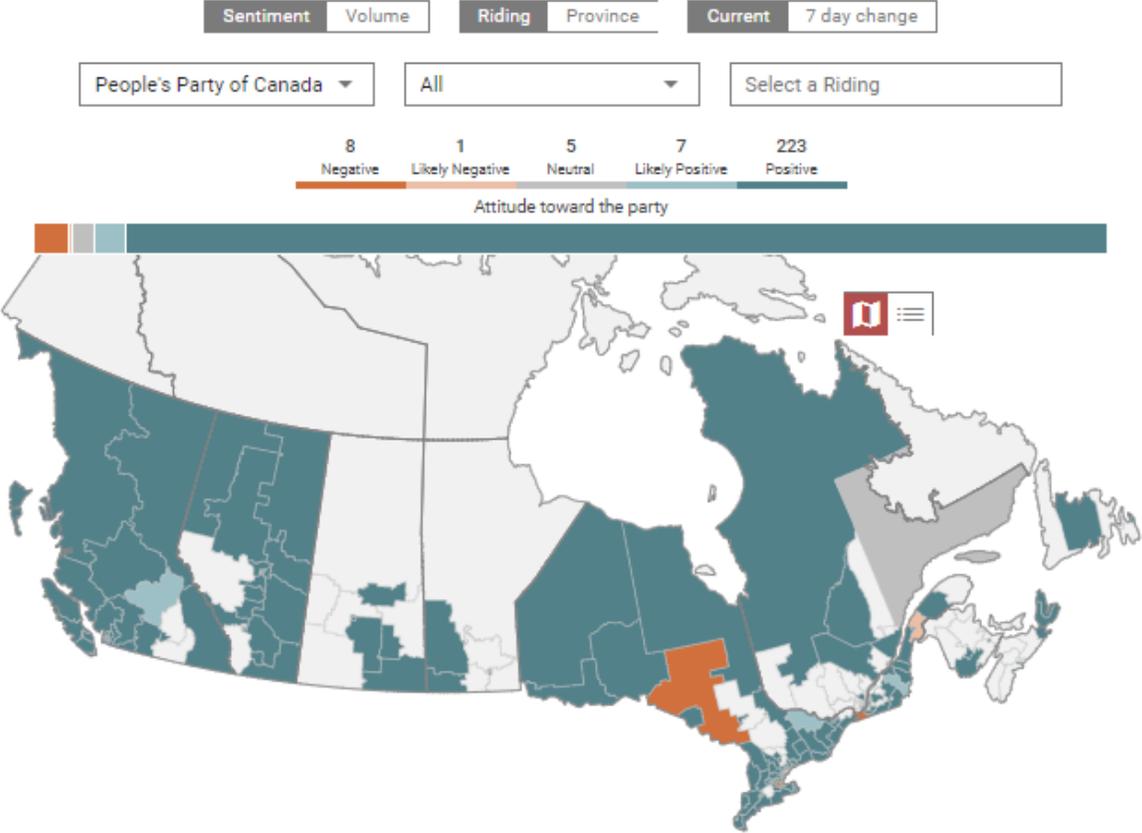
**How do we monitor and manage our reputation in times of uncertainty out of our control?**

# We need real-time data and insights to be agile.

## CANADIAN POLITICAL ATLAS

Political Parties    Political Issues    Political Actors    Logout

This tool allows Global News to track Canadian political activity on social media. It is organized by federal riding and by province.



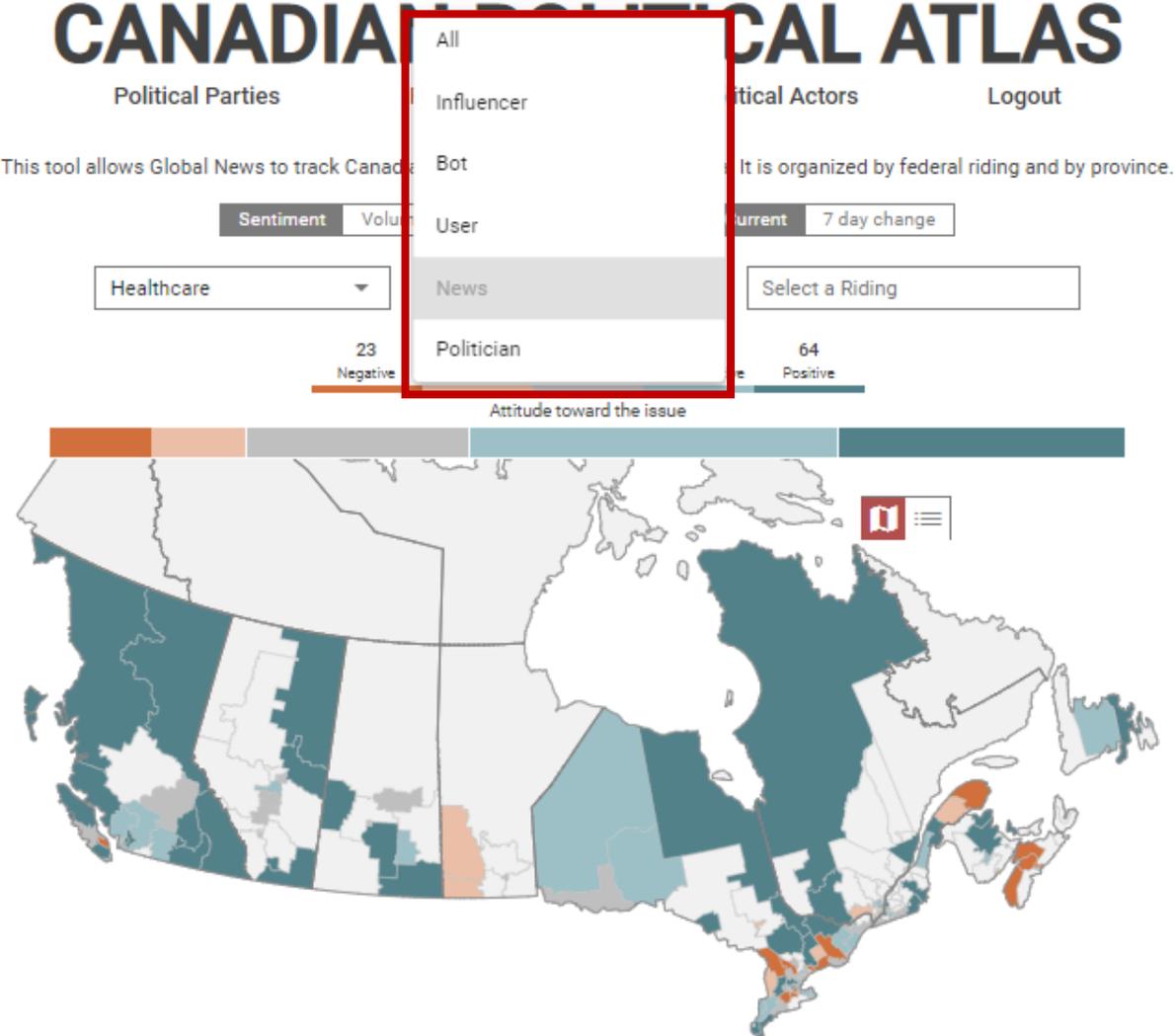
# Identify the issues that matter

Just like in our corporate approach, we identify the issues that matter to society and track these in real time.



# And understand how those issues are being discussed amongst key influencer groups

With the ability to filter by geography and influencer type of interest to the user.



# Most importantly, understand whether key players are aligned with the needs of constituents

## CANADIAN POLITICAL ATLAS

Political Parties

Political Issues

Political Actors

Logout

This tool allows Global News to track Canadian political activity on social media. It is organized by federal riding and by province.



From a tourism/place branding perspective, a tool like this can be modified to evaluate key destinations, societal issues, and performance against those issues to identify gaps and areas that need to be addressed.

| Province/Territory | Political actors     | Share of voice    |                   | How people talk about them |      |             |           |
|--------------------|----------------------|-------------------|-------------------|----------------------------|------|-------------|-----------|
|                    |                      | Healthcare        | Economy           | Net Sentiment              | Bots | Influencers | Volume ↑  |
| Quebec             | Justin Trudeau       | Insufficient Data | 1.2%              | Neutral                    | 2% ↑ | 52% ↑       | 129,437 ↓ |
| Saskatchewan       | Andrew Scheer        | Insufficient Data | Insufficient Data | Neutral                    | 2% ↑ | 53% ↓       | 81,061 ↓  |
| British Columbia   | Elizabeth May        | 17.5%             | 16.5%             | Neutral                    | 2% ↓ | 53% ↑       | 20,369 ↓  |
| British Columbia   | Jagmeet Singh        | 15.5%             | Insufficient Data | Neutral                    | 2% ↓ | 52% ↑       | 14,988 ↓  |
| Quebec             | Maxime Bernier       | Insufficient Data | 0.2%              | Neutral                    | 2% ↑ | 65% ↑       | 10,830 ↓  |
| Ontario            | Catherine McKenna    | Insufficient Data | Insufficient Data | Likely Negative            | 3% ↓ | 53% ↓       | 10,729 ↓  |
| Alberta            | Michelle Rempel      | Insufficient Data | Insufficient Data | Likely Negative            | 2% ↓ | 53% ↑       | 3,761 ↓   |
| Ontario            | Chrystia Freeland    | Insufficient Data | Insufficient Data | Neutral                    | 1% ↓ | 56% ↑       | 2,769 ↓   |
| British Columbia   | Jody Wilson-Raybould | Insufficient Data | Insufficient Data | Neutral                    | 2% ↑ | 50% ↓       | 2,732 ↓   |
| Ontario            | Lisa Raitt           | Insufficient Data | 27.6%             | Neutral                    | 2% ↑ | 48% ↓       | 2,622 ↓   |
| Ontario            | Jane Philpott        | Insufficient Data | Insufficient Data | Neutral                    | 3% ↑ | 45% ↓       | 1,833 ↓   |
| Ontario            | Bill Morneau         | Insufficient Data | Insufficient Data | Neutral                    | 2% ↓ | 56% ↓       | 1,761 ↓   |
| Saskatchewan       | Ralph Goodale        | Insufficient Data | Insufficient Data | Neutral                    | 2% ↑ | 49% ↓       | 1,682 ↓   |
| British Columbia   | Don Davies           | 11.1%             | Insufficient Data | Neutral                    | 2% ↓ | 53% ↑       | 1,553 ↓   |
| Ontario            | Charlie Angus        | Insufficient Data | Insufficient Data | Neutral                    | 2% ↓ | 48% ↑       | 1,326 ↓   |



# Dig deep to understand whether messaging is aligned with the needs of key audiences

The people of Papineau care about the economy and environment, and Trudeau is generally aligned in his communications, focusing on poverty/social inequality and environment.

< Back to full list

## Quebec



Liberal

**Justin Trudeau**

PRIME MINISTER, PAPINEAU

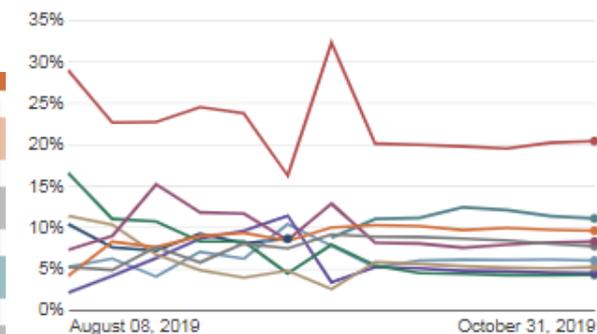
### Share of voice

|            |         |
|------------|---------|
| Healthcare | Economy |
| 0.2%       | 0.3%    |

### How people talk about them

| Sentiment | Bots | Influencers | Volume  |
|-----------|------|-------------|---------|
| Neutral   | 2%   | 52%         | 129,437 |

### What Justin Trudeau is discussing



| Topic                          | Percentage | Sentiment       |
|--------------------------------|------------|-----------------|
| Poverty/Social Inequality:     | 20%        | Likely Negative |
| Environment: Relat...          | 11%        | Neutral         |
| International Relations/Trade: | 10%        | Likely Po       |
| Infrastructure:                | 8%         | Likely Po       |
| Unemployment/Jobs:             | 8%         | Likely Po       |
| Crime/Violence:                | 6%         | Neutral         |
| Indigenous Issues:             | 5%         | Likely Po       |
| Economy: ment/J...             | 4%         | Neutral         |
| Housing:                       | 4%         | Likely Po       |
| Racism/Discrimin...            |            | Likely Negative |

### What the people of Papineau are discussing

| Social media trends    | Net Sentiment   | Volume ↑ |
|------------------------|-----------------|----------|
| Economy                | Likely Negative | 23%      |
| Environment            | Likely Negative | 15%      |
| Crime/Violence         | Negative        | 12%      |
| Immigration            | Likely Negative | 11%      |
| International Relat... | Neutral         | 9%       |
| Healthcare             | Likely Positive | 6%       |
| Energy                 | Neutral         | 4%       |
| Unemployment/J...      | Neutral         | 3%       |
| Racism/Discrimin...    | Likely Negative | 3%       |
| Infrastructure         | Likely Positive | 2%       |

# Dig deep to understand whether messaging is aligned with the needs of key audiences

Don Davies of British Columbia focuses predominantly on healthcare, but the people of Vancouver Kingsway care most about the economy, indicating misalignment and potential risk.

< Back to full list

## British Columbia



NDP  
**Don Davies**

HEALTH CRITIC, VANCOUVER KINGSWAY

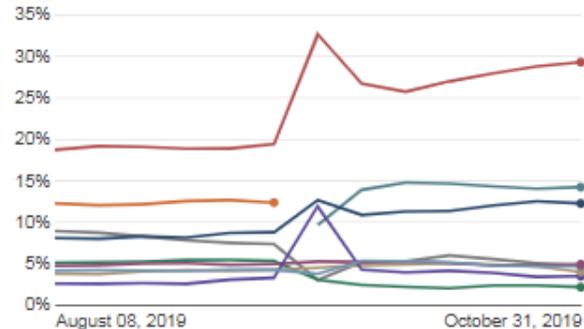
### Share of voice

|            |         |
|------------|---------|
| Healthcare | Economy |
| 0.2%       | 0.3%    |

### How people talk about them

| Sentiment | Bots | Influencers | Volume |
|-----------|------|-------------|--------|
| Neutral   | 2%   | 53%         | 1,553  |

### What Don Davies is discussing



November 07, 2019

|                               |
|-------------------------------|
| Healthcare: 29%               |
| Environment: 14%              |
| Housing: 11%                  |
| Poverty/Social Inequality: 5% |
| Crime/Violence: 5%            |
| Unemployment/Jobs: 5%         |
| Energy: 4%                    |
| Corruption: 3%                |
| Racism/Discrimination: 3%     |

### What the people of Vancouver Kingsway are discussing

| Social media trends    | Net Sentiment   | Volume ↑ |
|------------------------|-----------------|----------|
| Economy                | Neutral         | 28%      |
| Environment            | Likely Negative | 19%      |
| Crime/Violence         | Negative        | 13%      |
| Healthcare             | Likely Positive | 7%       |
| Immigration            | Likely Negative | 6%       |
| Energy                 | Neutral         | 6%       |
| International Relat... | Neutral         | 6%       |
| Poverty/Social Ine...  | Neutral         | 2%       |
| Infrastructure         | Likely Positive | 2%       |
| Racism/Discrimin...    | Likely Negative | 2%       |



# What Are the Implications for Our Work?

1. Quicker, more accurate information allows us to make smarter, faster decisions informed by data.
  - Less need to simply rely on gut instinct.
2. Agility is key, to both capitalize on unique, fleeting opportunities, but also to get ahead of a crisis.
3. With so many data sources available, it can be easy to fall into analysis paralysis.
  - Evaluate and integrate various data sources to provide a single source of truth.
4. Stay committed to your long-term strategy.
  - Reputation takes a long time to shift, and is built with a steady drumbeat of campaigns and small wins. Determine the strategy, stay consistent and organized.
5. Socialize the data so it can provide value throughout the organization and to appropriate partners.
6. Learn over time what works and what doesn't so you can replicate successes.

# THANK YOU