

Synovate EMS reveals latest purchase behaviour and media trends among Europe's most influential consumers

AMSTERDAM - Synovate, a leading global market intelligence company, has released the winter data from its European Media & Marketing Study (Synovate EMS). Designed to track media, prosperity and influence across 20 Western and Central European countries in Europe, the study covers Europe's most affluent consumers and top business decision makers (the top 13 % of the population). The latest result show that affluents are still spending their money on travel and electronics despite the downturn in the economy in many parts of Europe.

The EMS study, which is considered an industry standard by top media and marketing companies for their multi-national and pan-regional planning, includes EMS (top 13% of affluents in Western Europe), EMS Select (top 3% of affluents in Western Europe), CEMS (top 13% of affluents in Central Europe) and CEMS Select (top 3% of affluents in Central Europe). EMS covers affluent consumers in Austria, Belgium/Luxembourg, Denmark, Finland, France, Germany, Ireland, Italy, the Netherlands, Norway, Portugal, Spain, Sweden, Switzerland and UK while CEMS covers Poland, Hungary, Czech Republic and Russia.

The survey is conducted year-round and results are released twice a year. Synovate spoke with 18,241 affluent Western and Central European residents for the latest EMS winter results.

EMS constantly evolves to meet the needs of the market:

In 2008:

- Russia was included for the first time
- Website reach and frequency was added to allow true multi-media planning across TV, Print and the web
- Synovate celebrated the launch of EMS Digital Life alongside its sister survey PAX Digital Life (across Asia Pacific)

In 2009 (First Quarter)

Synovate will be launching EMS Middle East including eight countries across the region.

New subscribers

Synovate is delighted to welcome four new subscribers to EMS: Russia Today, History Channel, The Financial Times and Ogilvy. (Please see the attached fact sheet for the full subscriber list).

More frequent travellers

The study shows that Europe's elite are still travelling frequently taking 6 return flights a year. Europe's most frequent travelers are the EMS Select respondents (Top 3% in Western Europe) who are taking 11.84 return trips per year. Though they take fewer trips than their Western European counterparts Central Europe affluents are currently making 4.63 return trips per year an increase of 15% since the summer EMS results.

Ownership of consumer goods

The EMS survey also shows that the affluent respondents are still enjoying their electronics. While a DVD player is the most widely owned product, LCD/Plasma Screens have enjoyed the greatest growth with ownership increasing by 2 million people (16%) since the summer release of EMS data.

LCD/Plasma Screens are likely to enjoy even more rapid growth in the future, with more than four million affluents intending to purchase one in the next 12 months. In Central Europe ownership of a 'Home Cinema' is slightly more widespread than an LCD/Plasma Screens (26% versus 23%).

Home entertainment - Currently own	Total		EMS Countries		CEMS Countries	
	(000)	%	(000)	%	(000)	%
Total	45,799		39,665		6,134	
DVD Recorder	17,262	38%	15,089	38%	2,173	35%
Wide Screen TV	16,803	37%	14,697	37%	2,106	34%
LCD, Plasma Screen	14,732	32%	13,296	34%	1,437	23%
In-Car DVD Player	10,261	22%	9,290	23%	971	16%
Home Cinema	8,280	18%	6,667	17%	1,613	26%
HDTV	6,139	13%	5,822	15%	317	5%

While MP3 players and Laptops/Notebooks have reached 54% and 62% penetration respectively, it is Laptops/Notebooks who are likely to grow fastest in the next 12 months, with 10% of affluents intending to purchase one. In Central Europe this purchase intention is even higher at 13%.

Electronics – Ownership and Purchase Intention	Total		EMS Countries		CEMS Countries	
	(000)	%	(000)	%	(000)	%
Total	45,799		39,665		6,134	
Owned - Handheld/Palmtop Computer/PDA	9,710	21%	8,788	22%	922	15%
Plan To Buy In Next 12 Months - Handheld/Palmtop Computer/PDA	951	2%	801	2%	150	2%
Owned - Laptop/Notebook Computer	28,144	62%	25,248	64%	2,896	47%
Plan To Buy In Next 12 Months - Laptop/Notebook Computer	4,622	10%	3,832	10%	790	13%
Owned - MP3 Player/iPod	24,582	54%	21,499	54%	3,083	50%
Plan To Buy In Next 12 Months - MP3 Player/iPod	1,577	3%	1,388	4%	189	3%

Media consumption

Affluents across Europe are heavy media consumers with 46% reading at least three publications, 52% watching 13+ hours of TV a week and 23% spending at least 13 hours on the internet (excluding e-mail).

There are some cultural differences though, Central European affluents read less, watch more TV and use the internet more frequently. However, the Top 3% of Central Europeans (C-EMS Select) are more interested in print than their less affluent counterparts.

% Profile	Total	EMS Countries	EMS Countries - Top 3% Select	CEMS Countries	CEMS Countries - Top 3% Select
Total (000)	45,799	39,665	8,254	6,134	1,175
Read 3+ publications	46%	48%	64%	34%	51%
Watch 13hrs+/wk	52%	50%	43%	61%	49%
User internet 13+hrs/wk	23%	23%	26%	27%	34%

International media continues to thrive among affluent European adults, with relatively limited duplication between the international TV channels and their websites. This is also applicable to the international print titles and their websites. It allows these prestigious media brands to extend to a new, wider but equally valuable audience.

While readership of international print titles is more limited among affluents in Central Europe, these media websites are being introduced to a new larger audience in this region.

		EMS Countries	EMS Countries and Top 3% Select	CEMS Countries	CEMS Countries and Top 3% Select
Total	Audience(000)	39,665	8,254	6,134	1,175
Intl Print (AIR)	<i>Reach (000)</i>	4,559	1,817	442	173
	<i>%Reach</i>	11.5	22	7.2	14.7
Intl Print Websites (Weekly Contacts)	<i>Reach (000)</i>	4,250	1,481	721	184
	<i>%Reach</i>	10.7	17.9	11.8	15.7
Intl Print (AIR) + Intl Print Websites (Weekly Contacts)	<i>Reach (000)</i>	7,294	2,608	982	285
	<i>%Reach</i>	18.4	31.6	16	24.3
Intl TV (Weekly Reach)	<i>Reach (000)</i>	28,806	6,446	4,663	960
	<i>%Reach</i>	72.6	78.1	76	81.7
Intl TV Websites (Weekly contacts)	<i>Reach (000)</i>	11,077	3,087	1,116	315
	<i>%Reach</i>	27.9	37.4	18.2	26.8
Intl TV (Weekly Reach) + Intl TV Websites (Weekly Contacts)	<i>Reach (000)</i>	30,996	6,947	4,765	988
	<i>%Reach</i>	78.1	84.2	77.7	84.1
Inflight Magazine (AIR)	<i>Reach (000)</i>	6,815	2,957	371	191
	<i>%Reach</i>	17.2	35.8	6.0	16.3

Intl Print = Financial Times, International Herald Tribune, USA Today, Wall Street Journal, BusinessWeek, Economist, Newsweek, Time, Forbes, Fortune, CNBC European Business, Euromoney, Harvard Business Review, Institutional Investor, National Geographic Magazine (English edition), Scientific American

Intl TV = Aljazeera (English) Arte, BBC Prime, BBC World News, Bloomberg, CNBC, CNN, Discover, DW-TV, E! Entertainment, Euronews, Eurosport, France 24, FTV Fashion TV, MTV, National Geographic Channel, Sky News, Travel Channel, TV5 Monde

Inflight Magazines = Aeroflot Inflight Magazine, Air France Magazine, B There! Magazine, Blue Wings, Business Life, Cara, CSA Review, EasyJet Inflight Magazine, High Life, Holland Herald, Horizon Magazine, Iberia Ronda Magazine, Kaleidoscope, Lufthansa Magazine, Ryanair Magazine, SAS Norge Magasinet, Scanorama, Swiss Magazine, Ulisse, UP, Voyager, Flying Dutchman, Sky Europe – Runway Inflight Magazine, Sky Lines

Personality

While Europe's elite continue to travel - they are not immune to the changes in the global economy - they are becoming more conservative in their general outlook.

Strongly agree	Total (000)	Change*
<i>'I enjoy learning new things'</i>	18,938	-10%
<i>'There is not enough hours in a day'</i>	14,440	+6%
<i>'My work is a career not just a job'</i>	12,559	-14%
<i>'I am a broad minded and liberal thinker'</i>	5,339	-4%

* All % changes compare EMS Winter 2008 versus EMS Summer 2008

Sports

EMS respondents are a very sporty group of individuals – almost 19 million taking part in 'Outdoor pursuits' such as rambling and hiking. There is a trend towards more 'outdoor independent' types of sporting activities (see below). Ice/figure skating is enjoying the fast growth of 145% (although from a relatively low base of almost 300,000 to almost 700,000 people participating in this sport).

Central Europeans participate less regularly in all the major sports, although CEMS Select (which represents the Top 3%) are very fond of Tennis and Scuba Diving.

Sports on the increase are: *

Outdoor pursuits (+3%), Motor sports (+7%), tennis (+4%), Swimming/Scuba Diving (+4%), Skiing/ Snowboarding (+7%), Golf (+8%), Ice/Figure Skating (+145%), Extreme Sports (+8%), Cycling (+3%) and Boating (+3%).

* All % changes compare EMS Winter 2008 versus EMS Summer 2008

About Synovate

Synovate, the market research arm of Aegis Group plc, generates consumer insights that drive competitive marketing solutions. The network provides clients with cohesive global support and a comprehensive suite of research solutions. Synovate employs over 6,000 staff across 62 countries. More information on Synovate can be found at www.synovate.com

Notes to editors:

Synovate's major consumption surveys, EMS and PAX cover affluent consumers and influential business decision makers in 45 countries across Europe, Asia Pacific and Latin America. EMS offers agency planners and advertisers the ability to evaluate all aspects of behavior among the Top 13% of consumers across 20 countries in Europe. EMS represents 46 million of Europe's most affluent and influential consumers and incorporates EMS Select, which represents the Top 3% of Europeans and is designed for advertisers targeting only the most elite Europeans. Synovate will be launching EMS Middle East including eight countries across the region in the first quarter of 2009. More information about EMS is available in the attached EMS fact sheet or you may visit <http://ems.synovate.nl/>