

Pressrelease

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Research reinvented

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Synovate EMS, EMS Select and EMS Digital Life release

AMSTERDAM – Leading global market research firm Synovate today released the EMS, EMS Select, CEMS and EMS Digital Life.

- EMS measures the habits of Western Europe's most affluent consumers and top business decision makers: the top 13% across 16 markets.
- EMS Select incorporates all the same measures as EMS but represents the very top 3%.
- CEMS measures the habits of Central Europe's most affluent consumers and top business decision makers: the top 13% across 4 markets
- EMS Digital Life is a recontact survey of EMS respondents, focusing on the respondents media lifestyle and incorporating a media diary.

EMS represents Europe's most affluent and influential consumers:

- Between them they earn €2,300,000,000,000
- They take 155,662,000 air trips per year
- Spend 570,799,000 nights in hotels
- Most likely to want to holiday in Spain next year
- Favourite sport to follow Football (Soccer)
- 8,315,000 elite intend to purchase a car in the next 12mths
- And 437,000 Own a watch worth €7,500+



Media results

EMS 2009 clearly demonstrates that international TV channels and print titles in Europe and Central Europe continue to show a stable, healthy performance.

Net AIR PE News and Business* EMS 2009

| | |
|------------|-------|
| EMS | 7.0% |
| EMS Select | 14.5% |

* (**PE news/business print**: Pan European daily newspapers and Pan European weeklies/fortnightlies) **Base**: 24mths fieldwork

Net AIR All In-flight EMS 2009

| | |
|------------|-------|
| EMS | 17.4% |
| EMS Select | 34.8% |

Base: 24mths fieldwork

Net Weekly Reach PE TV News & Business** EMS 2009

| | |
|------------|-------|
| EMS | 42.6% |
| EMS Select | 54.4% |
| CEMS | 42.9% |

** (**News/Business PETV**: Aljazeera English, BBC World News, Bloomberg TV, CNBC, CNN International, EuroNews, France 24, RT Russia Today, Sky News) **Base** : 12mths fieldwork



Net Weekly Reach General PETV weekly* EMS 2009**

| | |
|------------|-------|
| EMS | 57.6% |
| EMS Select | 62.3% |
| CEMS | 59.9% |

*** (**General PETV**: BBC Prime, DW-TV (Deutsche Welle), Discovery Channel, E! Entertainment, Eurosport, Fashion TV, History Channel, MTV, National Geographic Channel, Travel Channel, and TV5Monde) **Base**: 12mths fieldwork

The EMS Select results show growth for international Print and TV.

| EMS Select | EMS 2009 | EMS 2008 |
|--|-----------------|-----------------|
| Net Weekly Reach PE TV News & Business** | 54.4% | 53.8% |
| Net AIR PE News and Business* | 14.5% | 14.1% |
| Net AIR PE General Monthlies**** | 12.9% | 12.4% |

****(**General Monthlies**: Euromoney, Harvard Business Review, Institutional Investor, National Geographic (In English), Scientific American) **Base**: 24mths

Next to the vast amount of TV and Print data EMS also offers usage of relevant media websites to facilitate significantly improved cross media planning, showing campaign performance across multiple platforms.

| PE TV News & Business**- Weekly Reach | Web | Web + TV |
|--|------------|-----------------|
| EMS | 22.4% | 50.6% |
| EMS Select | 33.1% | 64.1% |
| CEMS | 14.8% | 48.2% |

(News/Business PETV**: Aljazeera English, BBC World News, Bloomberg TV, CNBC, CNN International, EuroNews, France 24, RT Russia Today, Sky News) **Base** : 12mths fieldwork



| Reach General PETV***- Weekly Reach | Web | Web + TV |
|--|------------|-----------------|
| EMS | 21.8% | 66.1% |
| EMS Select | 29.5% | 73.2% |
| CEMS | 19.2% | 78.1% |

*** (**General PETV**: BBC Prime, DW-TV (Deutsche Welle), Discovery Channel, E! Entertainment, Eurosport, Fashion TV, History Channel, MTV, National Geographic Channel, Travel Channel, and TV5Monde) **Base**: 12mths fieldwork

| PE News and Business* | Weekly Reach Web | Weekly Reach Web + AIR |
|------------------------------|-------------------------|-------------------------------|
| EMS | 7.9% | 12.4% |
| EMS Select | 15.5% | 24.2% |

* (**PE news/business print**: Pan European daily newspapers and Pan European weeklies/ fortnightlies) **Base**: 12mths fieldwork

This indicates that the web is not taking away audience but actually introducing the brand to a new and wider audience.



NEW in EMS 2009

In EMS 2009 the psychographics on EMS have been significantly increased. These statements allow the user to segment in many different ways and create clusters to define their target audience. Synovate have also created a set of six new motivational clusters which may be used to provide another perspective on the EMS population.

Career builders: This group is mainly characterised by their attitude to work. While they may not have reached the pinnacle of their career yet, they are very committed to their work and get a real satisfaction from it.

Good Life: This group prefers to invest their time and money in improving the quality of their lives rather than building a career.

Innovation & Exploration: For the members of this group, technology is the answer - innovation makes their lives easier. They follow the latest developments in technology and always buy the newest innovative products released on the market.

Committed and Conscious: This group has many characteristics similar to the 'Good Life' group; they are committed to the environment, culturally aware, with a sense of community and social responsibility.

Global Networkers: The members of this group are very interested by what is happening in the world. They value exploration and discovery and want to know everything about the world in which they are living.

Prestige & Stature: For this group, it's all about style and status. They like to be seen to be well dressed and have their achievements recognized by their peers.



The example below shows the affinity to owning specific car brands and the important factors in choosing a car:



EMS and EMS Select 2009 Fieldwork Period:

| | | | |
|--------|---------------------------------|--------|---------------------------------|
| 2007-1 | 29 January 2007 – 28 July 2007 | 2008-1 | 28 January 2008 – 26 July 2008 |
| 2007-2 | 30 July 2007 – 24 December 2007 | 2008-2 | 28 July 2008 - 24 December 2008 |



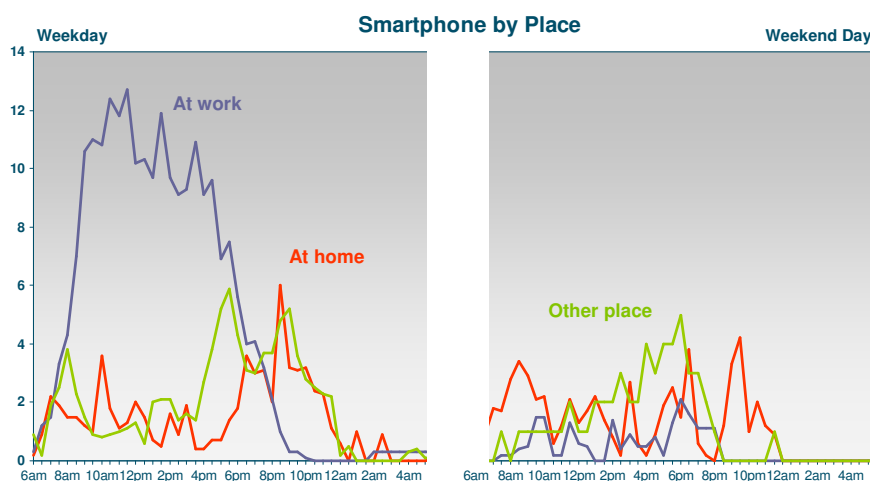
EMS Digital Life

The **lifestyle data covers** many on and off line features of the upscale European consumer and businessmen. For example the penetration of 1st, 2nd and 3rd screens such as smart phones.

EMS Digital Life 2009 shows an increase of smart mobile devices. The number of iPhones has increased by 1.4 million and the blackberry is now owned by 0.5 million more users compared to 2008. The average EMS Digital Life respondent spends over 6 hours per day on media of which, 53 minutes per day reading, 1 hour and 38 minutes watching TV, 1 hour and 34 minutes listening to music (radio or recorded music), 1 hour and 38 minutes on the Internet and 57 minutes on email or chatting online. Please note this incorporates simultaneous media activity i.e. if an individual spent an hour listening to the radio while surfing the internet this would count as 2hours of media activity.

The **extensive diary** captures a full day in the life with regard to place, activities, devices used, content used or generated and simultaneous activities, also known as multitasking. The diary reveals behaviour over time, which adds a very important dimension to traditional, static profiling.

Usage of Smartphone by ½ Hour



Base: Smartphone owners

Source: EMS Digital Life 2009



EMS Middle East

2009 has been a busy year for EMS with the expansion to the Middle East. Synovate conducted 2,569 interviews with affluent consumers in the UAE, Saudi Arabia, Qatar, Kuwait, Bahrain, Egypt, Lebanon and Jordan from mid June to September 2008. The EMS ME 2009 results show that international TV shows a strong performance in the Gulf and Non-Gulf area with a weekly viewing of 96%. International print shows a solid performance in the Gulf area with an AIR of 46%.

The synchronized offerings of EMS in Europe, Middle East and in 2010 also Africa, including Digital Life enable media owners and media specialists to have a true global perspective on the online and offline behaviour of their target groups.

**Note to the editor**

Please see the attached fact sheets for specific information on media consumption across the region.

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 6,700 staff across 62 countries. More information on Synovate can be found at www.synovate.com.

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