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### **AFFLUENT AFRICA REVEALED**

#### **First EMS Africa results out today – how the wealthy spend their time and money**

AMSTERDAM – The first cross-market survey measuring the media habits, buying patterns and attitudes of Africa's most affluent people is launched today by global market research firm Synovate.

EMS Africa shows the emergence of an aspiring, broad-minded and brand-conscious upper class in the strongest African markets. It provides exciting and much-needed data for international media owners and advertisers, who are looking to win new business in these important economies.

Economic growth in the region is averaging 4.5 per cent at a time when more established markets are barely ticking over. *"This is a defining time for the region, and EMS is the first media consumption survey specifically targeting the most affluent sections of society,"* says Vivien Marles, Synovate's Pan Africa Research Director.

EMS Africa tracks media usage, prosperity and influence across the top 15% of income earners in 12 cities across the key strategic African markets: Nigeria, South Africa, Kenya, Morocco and Cameroon. The survey measures consumption of nearly 50 TV channels, 80 print titles, 29 websites and 8 radio stations. It also monitors what affluent Africans own, what they intend to buy, and their attitudes to work, family, shopping and brands.

EMS Africa is the first five-market African survey measuring – in a consistent and comparable way - the media habits and buying power of the continent's growing upper-middle class. *'The launch comes as excitement among advertisers and media owners and builds over the potential for imminent growth of leading African markets'* says Reinier Schaper, EMS Director Synovate.

The launch of EMS Africa 2010 is the latest step in a long tradition of expansion of the EMS survey, which was launched in Western Europe 15 years ago, in Central Europe 10 years ago and in the Middle East in 2009.

Nick Hiddleston, Research Director Worldwide with ZenithOptimedia says: *"EMS Africa will be much more robust than the data that's been available on the continent before. Africa can now come to the table and say 'we've got our own data. EMS Africa will give media agencies a good currency to work with."*

#### **APPEALING TO ADVERTISERS**

Airlines, hotel groups, banks and financial services brands are among the most likely advertisers to want to reach middle-class African consumers. Among EMS Africa respondents:

- 34% use priority banking
- 39% own a property other than their home
- 40% have stocks, securities or bonds
- 14% spend 11+ nights in a hotel on holiday (11% spend 11+ nights in hotels on business)
- 13% plan to holiday in Western Europe in the next year
- 12% plan to holiday in the US in the next year



These people like to enjoy their wealth, and 64% say they're usually among the first people to buy technologically innovative products.

Among EMS Africa respondents, 79% say they prefer to buy well-known brands, 91% say they don't mind paying extra for quality, and 69% own at least two cars. In the past year, 7% have bought a luxury watch, and 26% have bought designer shoes in the same period.

## **MEDIA**

African high-fliers spend at least as much time consuming media as do wealthy people in Western Europe (measured on the EMS survey) and Central and Eastern Europe (in CEMS). In the case of the Internet, they're logging on much more.

### **% spending 60+ minutes a day (weekday)**

	<b>EMS</b>	<b>CEMS</b>	<b>EMS Africa</b>
Print	38	33	50
TV	87	88	87
Internet	45	52	76

International media is highly regarded among Africa's elite consumers, EMS Africa 2010 shows. Almost three-quarters (71%) enjoy watching foreign TV, and 68% enjoy reading foreign newspapers and magazines. Africans lead when it comes to new media – they're more likely than upmarket consumers in Europe to use mobile phones to keep tabs on international news.

Watching international TV is a daily habit for 77% of these high-flying consumers, and almost half (47%) say they regularly read an international newspaper or magazine. Media websites are regular destinations online - 20% of affluent Africans visit a print publication's website at least monthly, and 27% go to the website of an international TV channel once a month.

### **Average issue readership – international print**

#### **EMS Africa**

International Dailies	4%
International Weeklies / fortnightlies	27%
International Monthlies / Bi-monthlies	19%
Inflight Magazines	21%

### **Viewing of news & business international TV**

#### **EMS Africa**

Daily reach (% of EMS respondents watching daily)	58%
Weekly reach	85%
Monthly reach	86%

### **Viewing of general international TV**

#### **EMS Africa**

Daily reach	53%
Weekly reach	83%
Monthly reach	83%

Website traffic data in EMS AFRICA will enable better media planning and performance tracking of cross-platform campaigns.



**Reach of international publishers' websites EMS Africa**

Monthly combined reach of publishers' websites 20%

**Reach of international TV channels' websites EMS Africa**

Monthly combined reach of channels 27%

Definitions of different types of media are in the notes at the end of this release. EMS Africa also measures important national print, TV and radio consumption in Africa. For further information contact Synovate.

**AFRICA LEADS THE WAY IN MOBILE APPLICATIONS**

Computer and mobile phone penetration is high, with 84% of people surveyed owning a laptop, and 73% owning a desktop.

EMS AFRICA shows that 99% of Africa's affluent own a mobile, and 46% have a smartphone,

It's what Africans use their phones for that stands out, however. In Africa, the use of a smartphones to access the internet is significantly higher than in Europe and the Middle East.

As in other markets, SMS texting is the most commonly used phone application in Africa (87% send texts), and 71% take photos on their phone. But 63% access the internet via their smartphone, and 33% regularly use their phone for electronic banking.

**Features used regularly on a smartphone %**

	EMS Africa	EMS	CEMS	EMS Middle East
Email	53	23	20	48
MMS	58	20	30	65
SMS	87	77	89	90
Internet access	63	23	26	48
Company Intranet	22	6	4	17
Watching television	10	2	2	18

**WORKING NINE TO FIVE?**

African elites are very business oriented, with 83% saying they're very willing to make extra effort to achieve their career goals. Nine out of 10 say they're very committed to their job – to the point where more than half find it difficult to strike the right balance between work and their home life. EMS AFRICA respondents are not just consumers but highly influential business people.

**Base : Decision Makers**

- 47% formulated a strategic business plan over the past year
- 19% attended meetings abroad with executives from other countries
- 21% set up a new company in the past 12 months
- 47% are responsible for corporate purchases worth at least €40,000 a year
- 9% are responsible for corporate purchases of €400,000 or more a year



### THE LIVING IS EASY

In their free time, affluent Africans most enjoy eating out.

75% of respondents regularly enjoy haute cuisine

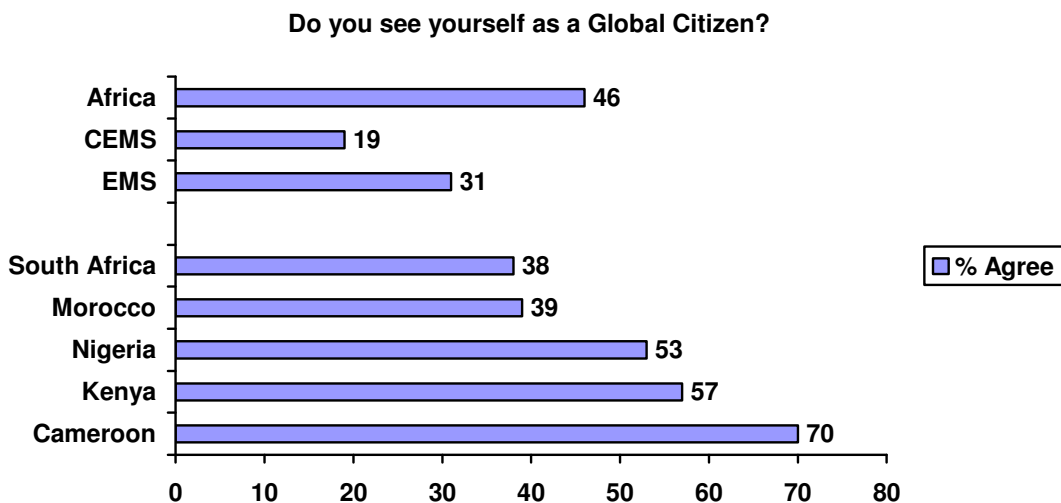
40% go regularly to the theatre

40% are members of a sports club

24% are members of a 'members-only' club

### ADVENTUROUS CITIZENS OF THE WORLD

The EMS survey covers 27 'psychographic' questions that reveal much about people's attitudes and priorities. EMS Africa finds that in Africa, upmarket consumers more often describe themselves as international in their outlook than those in Western and Central Europe.



The fact that the EMS surveys in Europe, the Middle East and now Africa are all consistent means media owners, agencies and advertisers can make meaningful comparisons and draw true insights about the online and real-world behaviour of this highly prized audience.

**Note to the editor**

The EMS Africa universe is based on 12 cities in 5 markets; Cameroon, Kenya, Morocco and South Africa

EMS Middle East universe is based on 12 cities in 8 markets; KSA, UAE, Kuwait, Bahrain, Qatar, Jordan, Lebanon and Egypt.

EMS universe is based on 16 countries. CEMS universe is based on Hungary, Poland, Czech Republic and two cities in Russia, Moscow and St. Petersburg

**Source:** EMS Africa 2010- Fieldwork November 2009- February 2010, EMS 2009: Fieldwork year 2008- CEMS 2009: Fieldwork year 2008, EMS ME: Fieldwork year 2008

Please see the attached fact sheets for specific information on media consumption across the region, and technical descriptions.

**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 5,968 staff across 62 countries. More information on Synovate can be found at [www.synovate.com](http://www.synovate.com).

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## NOTES ON MEDIA GROUPS

**International dailies:** Financial Times, International Herald Tribune, USA Today, The Wall Street Journal, Al Hayat International, Asharq Al Awsat

**International Weeklies / Fortnightlies:** BusinessWeek In English, The Economist , Jeune Afrique ,Newsweek In English ,TIME , Newsweek In Arabic,Forbes Magazine, Fortune

**International / Bi-:** African Banker, African Business, National Geographic, In English, New African, BusinessWeek Al-Arabiya, Forbes Arabia, The Africa Report

**Inflight Magazines:** Air France Magazine , Alitalia, Ulisse, British Airways Business Life , British Airways High Life ,Brussels Airlines - B There! Magazine, Emirates Open Skies, Etihad , Iberia Ronda Magazine, KLM - Holland Herald, Lufthansa Magazin, Qatar Airways Oryx, Ryanair Magazine, Saudi Arabian Airlines - Ahlan Wasahlan, South African Airways - Sawubona Magazine Swiss Air Lines - Swiss Magazine , Egypt Air – Horus, Royal Air Maroc - RAM Magazine-

**News & Business Pan African TV:** Africa 24 (A24), Al Arabiya, Aljazeera English, Aljazeera in Arabic BBC Arabic, BBC World News, Bloomberg TV, CNBC Africa, CNBC Arabiya, CNBC in English, CNN International, Euronews, France Vingt-Quatre (France 24), RT Russia Today, Sky News

**General Pan African TV:** Discovery Channel, DW, E! Entertainment, Eurosport, Fashion TV Arabia, FTV Fashion TV, History, MBC 1, MTV, MTV Arabia, National Geographic Channel, Nat Geo Wild, Travel Channel, TV Cinq Monde

**Pan African Print Websites :** Business Week Website ([businessweek.com](http://businessweek.com)),The Economist Website ([economist.com](http://economist.com)), Financial Times Website ([ft.com](http://ft.com)), Forbes Website ([forbes.com](http://forbes.com)), National Geographic Magazine Website ([ngm.nationalgeographic.com](http://ngm.nationalgeographic.com)), New York Times Website ([nytimes.com](http://nytimes.com)), Newsweek Website ([newsweek.com](http://newsweek.com)), Time Website ([time.com](http://time.com)), Wall Street Journal Website ([online.wsj.com](http://online.wsj.com))

**Pan African TV Websites:** Al Arabiya Website, in Arabic ([alarabiya.net](http://alarabiya.net)), Al Arabiya Website, in English ([alarabiya.net](http://alarabiya.net)), Aljazeera Website, in Arabic ([aljazeera.net](http://aljazeera.net)) ([aljazeera.net](http://aljazeera.net)), BBC Afrique Website ([bbcafrique.com](http://bbcafrique.com)), BBC Arabic Website ([bbc.com/arabic](http://bbc.com/arabic)), BBC Hausa Website ([bbc.com/hausa](http://bbc.com/hausa)) ([bbc.com/hausa](http://bbc.com/hausa)), BBC Swahili Website ([bbc.com/swahili](http://bbc.com/swahili)) ([bbc.com/swahili](http://bbc.com/swahili)), The International Website Of BBC ([bbc.com](http://bbc.com)) , BBC World News Website ([bbc.com/worldnews](http://bbc.com/worldnews)), Bloomberg Website ([bloomberg.com](http://bloomberg.com)), CNBC Website ([cnbc.com](http://cnbc.com)), CNBC Arabia Website ([cnbc.com/arabia](http://cnbc.com/arabia)), CNN Arabic Website ([cnn.com/arabic](http://cnn.com/arabic)), CNN Money Website, Incorp. Fortune.com ([money.cnn.com](http://money.cnn.com)), CNN Website ([cnn.com](http://cnn.com)), Deutsche Welle Website ([dw-world.de](http://dw-world.de)), Discovery Channel Website ([discovery.com](http://discovery.com)), EuroNews Website ([euronews.net](http://euronews.net)), Eurosport Website ([eurosport.yahoo.com](http://eurosport.yahoo.com)) , Fashion TV Websites ([ftv.com](http://ftv.com)), France Vingt-Quatre Website ([france24.com](http://france24.com)) , History Websites ([history.com](http://history.com)), National Geographic Channel Website ([nationalgeographic.com](http://nationalgeographic.com)), RT Russia Today Website ([rt.com](http://rt.com)), Sky News Website ([news.sky.com](http://news.sky.com)), Travel Channel Website ([travelchannel.co.uk](http://travelchannel.co.uk)), TV Cinq Website ([tv5.org](http://tv5.org))