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EMS BETTER BY DESIGN

Fresh methodology delivers quality insights and boosts response rates

AMSTERDAM – Leading global market research firm Synovate today released the EMS, EMS Select, CEMS and EMS Digital Life 2010

EMS 2010, is the first set of EMS results to take in some important changes in the methodology. As the survey has grown over the years it has become long and time consuming to complete. To counter any 'survey fatigue' effect and boost respondent enthusiasm for taking part, the survey has been split into blocks, so that no single respondent has to answer all the questions. A growing proportion of interviews are conducted online – now one-third of the total. This is important as it reaches people difficult to reach by phone – younger, single people who are more likely to rely on a mobile phone rather than a land line. In the online portion of the survey, logos were included to help stimulate recall and distinguish between media outlets that may sound similar.

"In essence, we've made it so that every person we interview only has to answer half of the media questions, more or less, and in order to compensate for this, we've increased the sample size by 50%," says Schaper. "This means the data for each question is based on a sample size that's just as robust as before. The benefit, though, is that the average time taken for completion of the survey has been reduced from 37 minutes to 24 – a boon not just for respondents but also for interviewers. Response rates have therefore increased, from 58% to 72% for the regular EMS respondent and from 66% to 79% for business respondents."

Reinier Schaper, Director EMS

Improving methodology without any change in results is not possible. The new EMS also contains several smaller changes/improvements to the questionnaire, it is therefore not recommended that users make comparisons with previous releases.



Average issue readership – Pan European Print

	EMS 2010	EMS Select	CEMS
International Dailies	2.7%	6.3%	1.7%
International Weeklies / fortnightlies	8.6%	16.8%	8.5%
News/ business PE Print	11.1%	22.6%	9.9%
General Monthlies / Bi-monthlies	10.9%	19.3%	12.2%
Inflight Magazines	16.8%	33.1%	8.9%

Viewing of news & business Pan European TV

	EMS 2010	EMS Select	CEMS
Daily reach	15.1%	21.6%	14.4%
Weekly reach	44.9%	58%	45.4%
Monthly reach	64.8%	78.1%	65.7%

Viewing of general Pan European TV

	EMS 2010	EMS Select	CEMS
Daily reach	24.5%	27.6%	44.5%
Weekly reach	60.8%	67.2%	80.7%
Monthly reach	78%	83.6%	90.1%

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- Monthly Reach	Web	Web + TV
EMS	37.9%	73%
EMS Select	52.2%	85.4%
CEMS	36.8%	74.3%

Reach General PETV- Monthly Reach	Web	Web + TV
EMS	26.9%	81.2%
EMS Select	31.2%	86.6%
CEMS	43.6%	91.9%

PE Print News and Business	Monthly Reach Web	Web + AIR
EMS	20.3%	35.2%
EMS Select	25.7%	44.2%

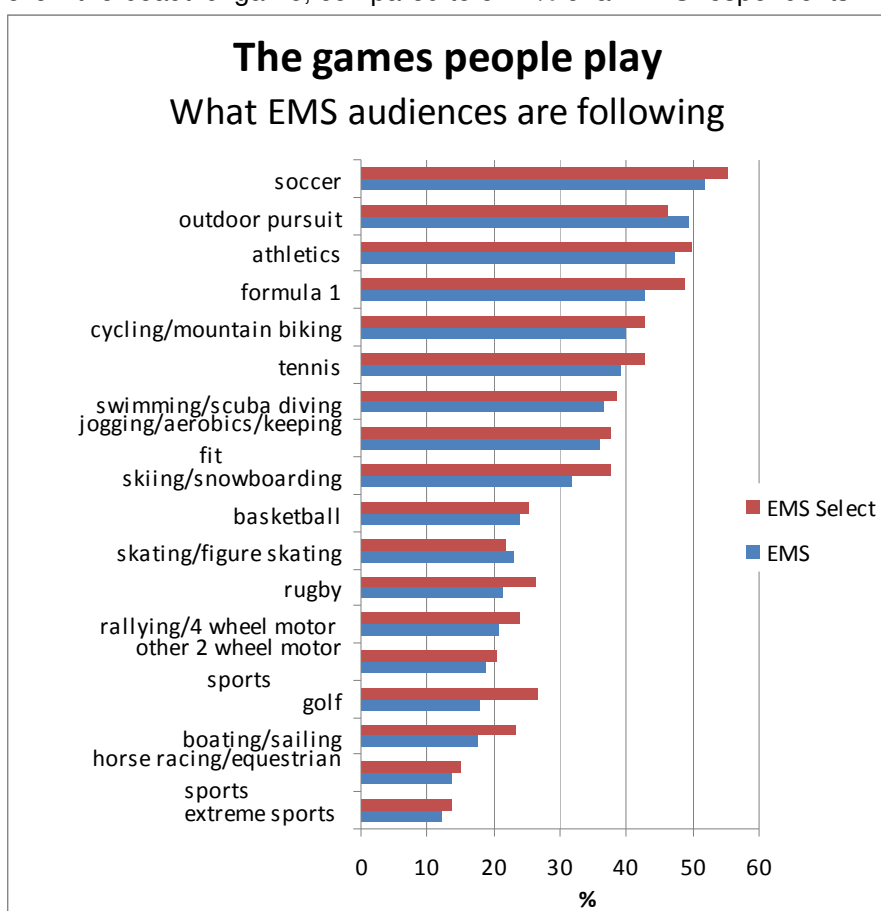
Please see notes for Media definitions



EMS Select consumers want the finest of everything and will move mountains to get it

Select consumers are the wealthiest 3% of people in Europe, and lead hectic, jet-setting lives, but sport and culture remain priorities they make time for, along with a spot of shopping.

The latest data shows they're significantly more sporty than the broader EMS audience, following not just rich men's sports such as skiing and golf, as you might expect, but also more rugged pursuits such as surfing and skydiving. They even watch more football – 55% follow the beautiful game, compared to 51.7% of all EMS respondents.



Select consumers are acquisitive; 64.9% say it's important that their house is kitted out with the most modern appliances, and 27.8% like to splash out on an expensive treat for themselves.

Asked whether they plan to buy a luxury watch in the next year, 15.3% said yes, and 30.2% said maybe. Curiously, though, these people are not wild about shopping, despite having to worry less than most about the bill. Only 11.8% say they really enjoy the fun of shopping, and 15.3% positively hate it. This might explain their willingness to snap up well-known brands rather than experiment – 14.9% strongly agree that they prefer marques they know well, and 88.9% don't mind paying extra for quality.



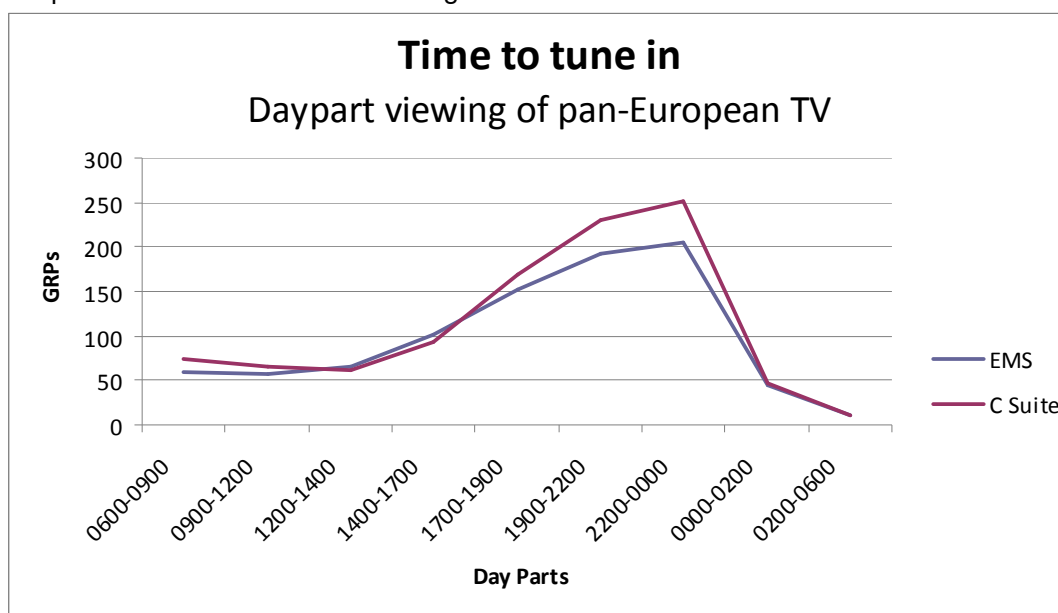
Synovate’s motivational clusters, which identify themes in responses to lifestyle questions to paint a more colourful picture of consumers, show that 20.6% of Select respondents are what we call “Innovators and Explorers”, far more than in the broader EMS sample (14.7%). Often speaking two or three languages, they have an international outlook and love all things new – from technology to new experiences. About the same proportion (19.6%) are classed in the “Prestige and Stature” cluster, happy to pay for the right look and the right gadgets to match. They’re willing to work hard to achieve their career goals.

Device usage information sheds new light on senior executives’ appetite for news and entertainment

The C-suite, it seems, just can’t switch off. EMS respondents who are either employed as chairman, CEO, CFO or hold another board position in a company employing 50 or more people, or are self-employed and have 50-plus employees, are counted apart from the main EMS survey as the C-suite.

They are more likely than the rest of EMS to read international print titles; average issue readership of all titles is 57.8% for these high fliers, compared to 35.2% for the total EMS survey. They’re also the biggest consumers of pan-regional television, and heavy users of the internet - 83.4% go online either six or seven days a week (EMS average 75.9%); they’re not just checking emails either – 7.4% of C-suite respondents are spending four hours or more a day online. This is despite almost half saying it’s difficult to find the right balance between work and private life, and 34.4% saying they feel strongly that there’s not enough time in the day. Juggling different devices to stay in touch is therefore the order of the day.

C-suite consumers are the biggest consumers of television via a computer or laptop among the EMS sample, either at work (which 19.8% of C-suiters do) or at home (43.0% do). They’re also the biggest viewers of television content via mobile, with 10.5% tuning in this way, compared to 6.1% of the EMS average.



Please see notes for Media definitions



Media planning just got easier, with the creation of a comparable EMS data set covering Europe, the Middle East and Africa

The expansion of the EMS survey has come region by region; in December 2010, all the results will be available in a single dataset to enable at-a-glance comparisons between markets as diverse as the Czech Republic and Cameroon.

The questionnaires used across all the EMS regions are about 80% the same, meaning that most of the data can be meaningfully compared, and used for more streamlined global and multi-region media planning.

“This is EMS moving with the times, and is a big step forward,” says Reinier Schaper. “Many advertisers take EMEA as a region, so it really helps if there’s one way of looking at all these markets, and one currency.”

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.

Is your digital life switched on or off?

EMS Digital Life includes 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 mobile devices. EMS Digital Life 2010 shows an increase of smart mobile devices, 40% of the EMS Select population now own a smart mobile device compared to 26% in EMS Regular.

New in EMS Digital Life 2010 is the measurement of mobile websites on brand level. The smart mobile device has become an important new source of information for news and current affairs.

Monthly reach Mobile websites (Digital Life Universe)

	EMS Regular	EMS Select
Mobile News and Business PE Media	15.4%	23.4%
Mobile General PE Media	7.3%	10.6%

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Fieldwork characteristics

The telephone fieldwork is conducted on a continuous basis, with no break during the summer months. The fieldwork period is:

Wave I 29 January 2009 – 24 July 2009 - Wave II, 27 July 2009 – 24 December 2009.

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 6,000 staff across 62 countries. More information on Synovate can be found at www.synovate.com.

NOTES ON MEDIA GROUPS

National Geographic (in English): Only includes the English language international edition (excluding all other language versions) of National Geographic magazine in the EMS countries

PE daily newspapers: Financial Times, International Herald Tribune, USA Today, Wall Street Journal Europe

PE weeklies/ fortnightlies: Bloomberg BusinessWeek, The Economist, Newsweek, TIME, Forbes, Fortune

PE news/business print: Pan-European daily newspapers and Pan-European weeklies/ fortnightlies

PE general monthlies: Euromoney, Harvard Business Review, National Geographic (English language version), Scientific American, CNBC European Business, Bloomberg Markets

All inflights: Includes all inflights measured multi-nationally and nationally (see media list)

All PE Print: PE news/business print and PE general monthlies and All inflights and Metro (all country editions) and 20 Minutes (all country editions)

News/Business PETV: Aljazeera English, BBC World News, Bloomberg TV, CNBC, CNN International, euronews, France 24, RT Russia Today, Sky News

General PETV: DW-TV (Deutsche Welle), Discovery Channel, Discovery Travel & Living, E! Entertainment, Eurosport, Eurosport 2, FTV Fashion TV, History, LUXE TV, MTV, National Geographic Channel, Nat Geo Wild, Travel Channel, TV5Monde

All PETV: All listed channels (News/Business PETV and General PETV)

Please see notes for Media definitions

**PE TV News & Business - Websites**

Aljazeera Website (aljazeera.net), BBC Websites (bbc.com Or bbcworldnews.com), Bloomberg Website (bloomberg.com), CNBC Website (cnbc.com), CNN Websites (edition.cnn.com, money.cnn.com And fortune.com), euronews Website (euronews.net), France 24 Website (france24.com), RT Russia Today Website (rt.com), Sky News Website (skynews.com)

PETV General TV – Websites

Deutsche Welle Website (dw-world.de), Discovery Channel Website (All Country Editions), Eurosport Website (All Country Editions), Fashion TV Website (ftv.com), Fashion TV Website (ftv.pl), History Website (All Country Editions), LUXE TV (LUXE.TV), National Geographic Channel Website (All Country Editions), Travel Channel Website (All Country Editions), Travel Channel Website (travelchanneltv.pl), TV 5 Monde Website (tv5.org or tv5monde.com)

PE News and Business Print – Websites

Bloomberg Businessweek Website (businessweek.com), Economist Website (economist.com), Financial Times Website (ft.com), Forbes Website (forbes.com), Forbes Website (forbes.pl), New York Times.com (nytimes.com), Newsweek Polska Website (newsweek.pl), Newsweek Russia Website (runewsweek.ru), Newsweek Website (newsweek.com), TIME Website (time.com), Wall Street Journal Europe Website (wsj.com)

Mobile News and Business Media: Aljazeera, BBC, Bloomberg, BusinessWeek, CNBC, CNN, CNN Money, The Economist, euronews, FT, Forbes, France 24, Metro, NYT, Newsweek, Reuters, RT Russia Today, Sky News, TIME, WSJ

Mobile General Media: DW-TV, Discovery Channel, Eurosport, FTV Fashion TV, History, LUXE TV, National Geographic Channel, National Geographic Magazine, Travel Channel, TV5Monde