

## Pressrelease

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Research reinvented



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Date: 14 March 2011 04:00 AM CET

## Introducing Europe's elite – the personalities behind the data

### Media habits, spending, lifestyles, attitudes and intentions exposed in biggest EMS survey yet

Synovate is delighted to launch the most comprehensive analysis available of the richest and most influential consumers in Europe. EMS 2011 unpacks the habits, plans and motivations of the continent's wealthiest and most sophisticated people ... 47 million highly desirable targets for brands in categories as diverse as cars and holidays to banking services and handbags.

Highlights of this release include:

- Fingers on the pulse - TV, press, online and mobile internet & apps consumption in focus
- Got personality – EMS introduces the people behind the data. Meet Victoria and Klaus
- Give and take – what affluent Europeans have, and what they give away
- Flying higher – where they'll be a year from now

“Marketers and media planners need to understand their target audience in a way that goes much deeper than topline data showing how many people watch one TV news channel compared to another,” says Nathalie Sodeike, Synovate's EMS Director. “EMS keeps on evolving, and as well as giving campaign planning essentials like reach and frequency, we can really get under consumers' skin and paint a full and dynamic picture of upscale Europeans.”

EMS 2011 represents the highest-earning 13% of the population in 20 markets across Western and Central Europe. Refinements to the design of this, the 16<sup>th</sup> release of EMS, include consumption of media brands via mobile applications and mobile websites. This is the first year that an EMEA-wide set of data, combining results from Europe, the Middle East and Africa, has enabled at-a-glance comparisons between markets as diverse as the Czech Republic and Cameroon, mirroring the multi-region planning priorities of many advertisers. From next year, we'll be including Turkey too.

## Fingers on the pulse

As the number of ways of accessing news and entertainment goes up, so these busy executives seem to squeeze more time out of their days to use them all. So, while time online and on mobile internet has been rising, consumption of international newspapers, magazines and pan-regional television remains a priority. There are some surprises, though, in what many of these suits are doing on their iPhones and BlackBerries: they're as likely to be playing games as they are to be doing online banking, and 33% of EMS consumers have used social networks such as Facebook in the past month.

### Base: EMS 20 Summer 2011

<b>Pan European Print - %AIR</b>	<b>EMS</b>	<b>Select</b>
All PE Print	34.8%	55.2%
Dailies	3.2%	7.6%
Weeklies/fortnightlies	9.2%	17.8%
Monthlies	11.8%	21.6%
News/business	11.2%	22.2%
Inflights	16.1%	33.7%

<b>Pan European TV – % Weekly Reach</b>	<b>EMS</b>	<b>Select</b>
All PE TV	72.7%	81.3%
News/business	43.5%	58.3%
General entertainment	63.1%	69.3%

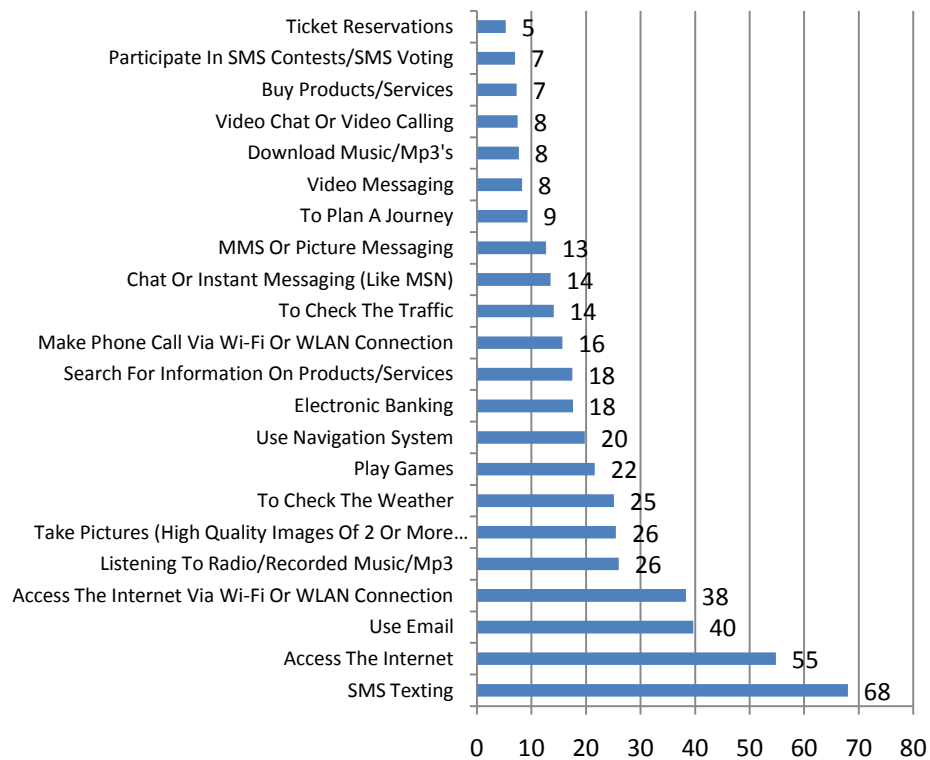
<b>% Reach*</b>	<b>EMS</b>	<b>Select</b>
Pan European Web	57.4%	71.4%
Pan European Mobile**	34.9%	51.0%
Pan European Web+Mobile	68.1%	81.9%
Pan European Print+TV+Web+Mobile	94.1%	97.9%

\* Web, mobile, TV = Monthly reach, Print = % AIR

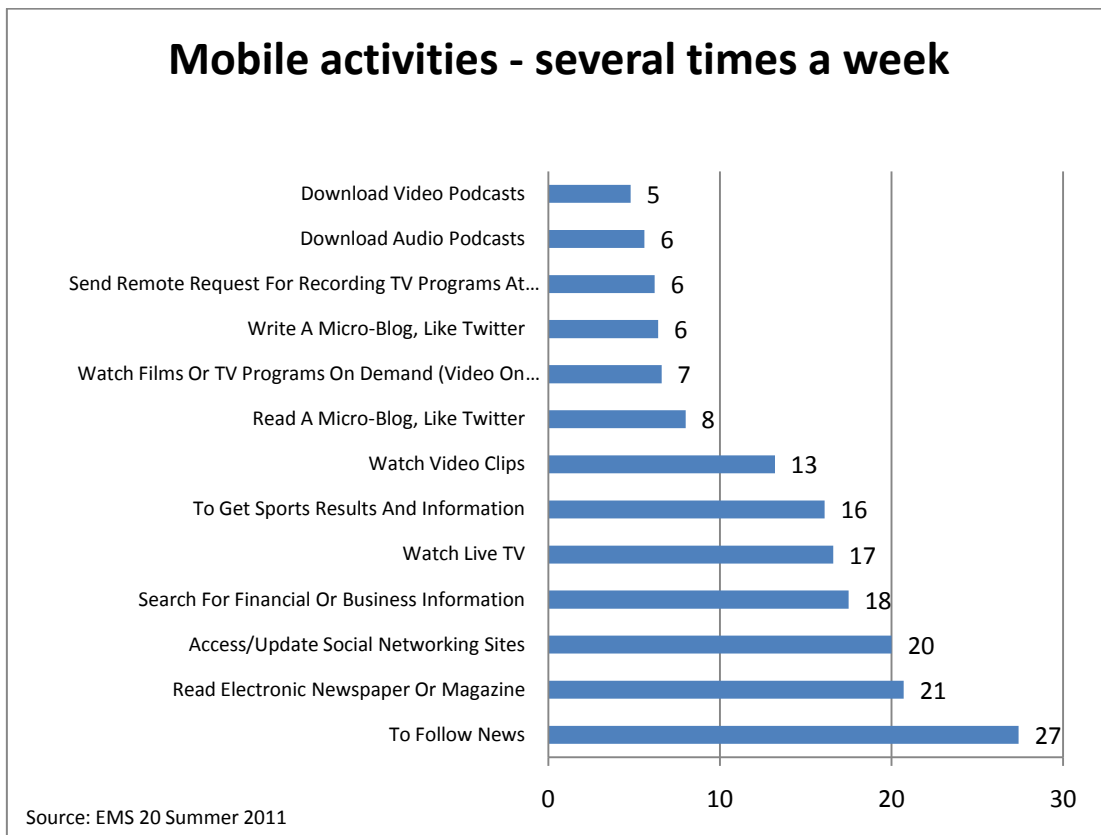
\*\* Monthly mobile reach established in the profile questionnaire

Mobile internet is now such a huge part of high-fliers' lives that this is part of the main EMS survey, rather than the separate Digital Life study.

### Mobile activities - several times a week



Source: EMS 20 Summer 2011



### **Got personality – EMS introduces the people behind the data. Meet Victoria and Klaus**

The depth of information now available in the EMS survey allows us to paint a colourful picture of Europe’s most desirable consumers. This is a group that, on the face of it, is unified by their love of the finer things in life and their determination to get on and provide for their families, yet scratch below the surface and you find distinct personalities, motivations, hopes and preferences.

Meet, for instance, ‘Victoria’, who might be a London-based IT consultant. Despite a hectic work schedule, she watches nearly two hours’ TV a day, listens to the radio for more than 90 minutes, and reads newspapers and magazines for nearly an hour. She loves to travel, and spends much of her down time online researching and planning her next trip. Maybe it’ll be Egypt, or an eco-tour of Brazil. Victoria is a big online shopper too, spending about €1,000 in the past six months online – much of it on flights and hotels.

‘Klaus’, meanwhile, is typical of many EMS respondents we call Influential Opinion Leaders – people who are invited to speak at conferences, tend to have MBAs and frequently have international meetings. Germany is home to more people like Klaus than any other country; their annual income averages €74,000, compared to the EMS average of €47,000, they are very frequent flyers, thrive on work (31% say they get real satisfaction from work, compared to the 23% EMS average), and 27% of them fly business class even within Europe. Klaus checks his LinkedIn account once a month.

There are numerous other interesting targets within EMS and Synovate is happy to help journalists compile detailed profiles of different EMS consumers. Ask [Marlies.vanOudheusden@synovate.com](mailto:Marlies.vanOudheusden@synovate.com) why, for instance, ‘Alexander’ will buy an Audi but ‘Victor’ wants a Volkswagen, and which holiday destinations are going to be most popular next year.

### **Give and take – what affluent Europeans have, what they want, and what they give away**

With high incomes come expensive tastes, and 42% of people like Victoria and Klaus wear a watch that cost between €150 and 1,500. Many have second homes – 28% have a bolthole in their home country, and 6% have a place abroad. Times may be hard for some, but 34% of the EMS audience say they’ve cracked open champagne in the past month. Just under half of these well-off households have two cars, and 15% have three cars or more. But, they’re as likely to have a Citroen, Ford or Peugeot parked in the drive as a BMW or Audi, and the single most popular car make to own is a Volkswagen. High earners are more likely to have a stationwagon/estate car (33%) than a sports car or cabriolet (17%).

They’re not all motivated by technology and luxury, though; 28% regularly play sport, 25% enjoy photography, and 13% regularly find time to play cards; 69% say they like to cook for pleasure. Interest in volunteering is high – 40% say they’re interested in it and 18% regularly give their time to work with charities or community groups, and a further 13% are involved in environmental protection. As many as 52% say they often make donations to charity.

Among the nearly 11,000,000 people (23% of our audience) who expect to buy a car in the next 12 months, just under half will buy a new car, and a further 18% are undecided over new or used. 24% of those in the market for new wheels say they’re planning to buy a hybrid vehicle.

**Flying higher – where they'll be a year from now**

Where are Europe's big earners going? On holiday or shopping! Just over a quarter of this audience take three or more foreign holidays a year, and they have their sights set on Egypt, Thailand, Mexico, Spain, Jordan, the USA, Australia and Brazil.

If it's not travel they're booking, it's technology they're buying. While laptops and notebook computers are already widely owned, they're the item that most people say they intend to buy in the next 12 months, and LED television ownership looks set to double. Phones will also continue to be big business; while 17% of our audience already own a smartphone, 9% plan to get one in the coming year. Tablet computers, including iPads, are now owned by 6% of EMS consumers; a further 9% say they have a tablet on their shopping list for the year ahead.

Good news for advertisers: 37% of Europe's affluent consumers say they're more likely to buy or consider buying brands they see advertised in international media.

**Coming soon**

\* Global campaign planning will get simpler with the launch in early 2012 of the Global Elite Media Survey – GEMS – linking EMS with Synovate's sister survey in Asia, PAX. GEMS will allow media analysis across 44 markets in Europe, the Middle East, Africa and Asia-Pacific and provide a global media currency.

\* The first results from our fieldwork in Turkey will be available in summer 2012, covering the biggest cities in this fast-growing market: Istanbul, Ankara and Izmir.

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**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. [www.synovate.com](http://www.synovate.com).

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## MEDIA DEFINITIONS

**Pan European daily newspapers:** Financial Times, International Herald Tribune, USA Today, Wall Street Journal Europe

**Pan European weeklies/ fortnightlies:** Bloomberg Businessweek, The Economist, Newsweek, Time, Forbes Magazine, Fortune

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

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

**Inflights:** Aeroflot Inflight Magazine, Air France Magazine, Blue Wings (Finnair), Business Life (British Airways), Cara (Aer Lingus), CSA Review (Czech Airlines), Flydoscope (Luxair), High Life (British Airways), Holland Herald (KLM), Horizon Magazine (Malev), Iberia Ronda Magazine, Kaleidoscope (LOT Polish Airlines), Lufthansa Magazin (Monthly), SAS Magasinet, Scanorama (SAS), Skylife (Turkish Airlines), Swiss Magazine (Swiss Air Lines), Traveller (Easyjet), Ulisse (Alitalia), UP (Tap), Voyager (BMI), B There Magazine (Brussels Airlines), Flying Dutchman (KLM), Ryanair Magazine, Sky Lines (Austrian Airlines)

**All Pan Euro Print:** Includes all titles listed above, plus all country editions of Metro and 20 Minutes

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

**General PETV:** Discovery Channel, Discovery Travel & Living, DW-TV (Deutsche Welle), E! Entertainment, Eurosport, Eurosport 2, FTV Fashion TV, History, MTV, Nat Geo Wild, National Geographic Channel, Travel Channel, TV5 Monde

**PE TV News & Business – Websites:** Aljazeera Website ([aljazeera.net](http://aljazeera.net)), BBC Websites ([bbc.com](http://bbc.com) Or [bbcworldnews.com](http://bbcworldnews.com)), Bloomberg Website ([bloomberg.com](http://bloomberg.com)), CNBC Website ([cnbc.com](http://cnbc.com)), CNN Websites ([edition.cnn.com](http://edition.cnn.com), [money.cnn.com](http://money.cnn.com) And [fortune.com](http://fortune.com)), euronews Website ([euronews.net](http://euronews.net)), France 24 Website ([france24.com](http://france24.com)), RT Russia Today Website ([rt.com](http://rt.com)), Sky News Website ([skynews.com](http://skynews.com))

**PETV General TV – Websites:** Deutsche Welle Website ([dw-world.de](http://dw-world.de)), Discovery Channel Website (All Country Editions), Eurosport Website (All Country Editions), Fashion TV Website ([ftv.com](http://ftv.com)), Fashion TV Website ([ftv.pl](http://ftv.pl)), History Website (All Country Editions), National Geographic Channel Website (All Country Editions), Travel Channel Website (All Country Editions), TV 5 Monde Website ([tv5monde.com](http://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 Website (newsweek.com), TIME Website (time.com), Wall Street Journal Europe Website (wsj.com)

Note: National Geographic (in English) only includes the English-language international edition (excluding all other language versions) of National Geographic magazine