



PAX Launch 2013

October 2013

Ipsos MediaCT



Asia leads global recovery

**Robust domestic demand,
accommodative monetary policies,
rapid credit growth and the rebound
of capital inflows since the latter
half of 2012 are key drivers.**

Source: IMF

Source: IMS, Regional Economic Outlook for Asia and the Pacific, April 2013.

Ad spend figures up in confidence



Fast-track Asia: estimated ad expenditure of 10% in 2013, followed by 10%-11% annual growth in 2014 and 2015

A photograph of a high-end outdoor living space at twilight. In the foreground, there are wicker lounge chairs with striped cushions on a light-colored stone patio. To the left, a swimming pool is visible with a lounge chair floating on it. In the background, a large, well-lit house with columns and a ceiling fan is visible. The sky is a deep blue.

THE AFFLUENT continued with their upscale lifestyle

19,890
complete interviews

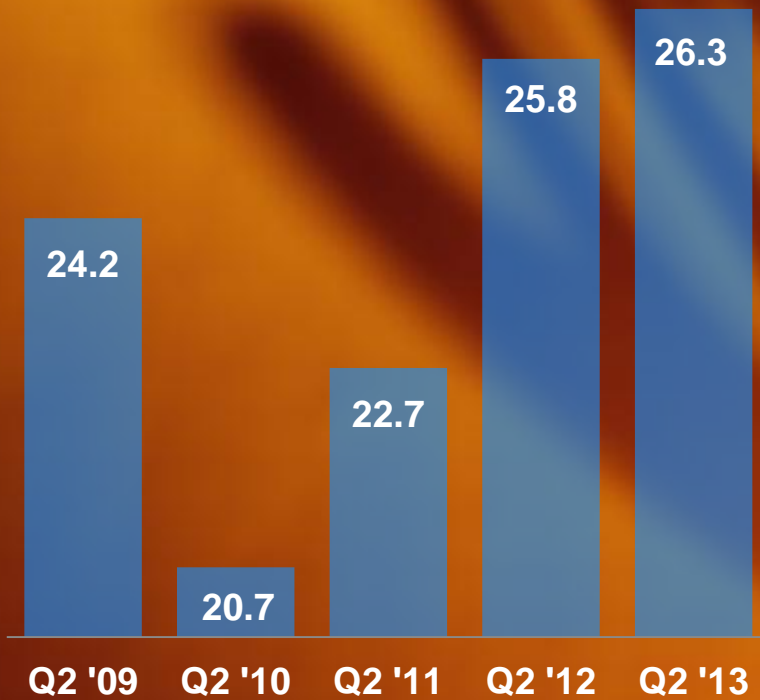
2.5 million
telephone attempts

76K
interview hours



Source: Ipsos PAX Q3 2012 to Q2 2013. 11 markets total.

Personal income is up



Source: Ipsos PAX Q3 2012 to Q2 2013. 10 markets excluding Tokyo. Figures shown are volumetric totals of monthly personal income (in billion USD).

A close-up, shallow depth-of-field photograph of several gold coins. The coins are scattered across the frame, with some in sharp focus and others blurred. The lighting is warm, highlighting the metallic texture and intricate designs on the coins. The background is a dark, textured surface, possibly leather or wood.

USD 767 billion

Source: Ipsos PAX Q3 2012 to Q2 2013. 10 markets excluding Tokyo. Excluding investment in properties.

14.4M

international air trips in the past year



Source: Ipsos PAX Q3 2012 to Q2 2013. 10 markets excluding Tokyo. Figures shown in chart are international air trips (in '000).

6.6M international business air trips taken in past 12 months

13% ↑
compared to 2012

An all time high for the past 5 years

Source: Ipsos PAX Q3 2012 to Q2 2013. 10 markets excluding Tokyo.

They don't just work hard ...



14%↑

international air trips vs. past year

Source: Ipsos PAX Q3 2012 to Q2 2013. 10 markets excluding Tokyo. Figures shown in chart are international leisure trips by air (in '000).

68%

own a private car

17% plan to buy one over the next 12 months



Source: Ipsos PAX Q3 2012 to Q2 2013. 10 markets excluding Tokyo.

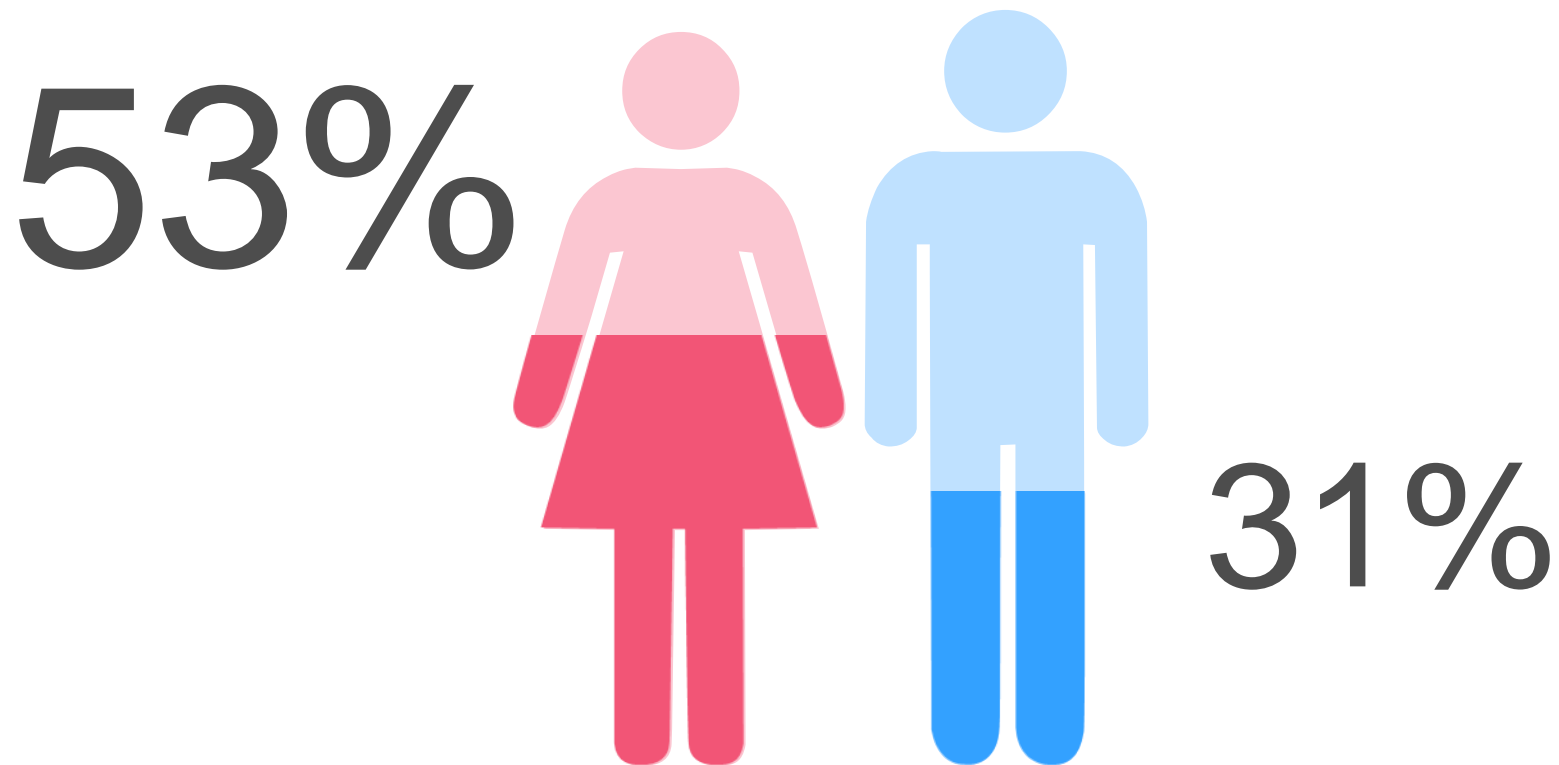
33%

own fine jewelry or watches

Source: Ipsos PAX Q3 2012 to Q2 2013. 10 markets excluding Tokyo. Fine jewelry or watches of USD 1,000+ included.

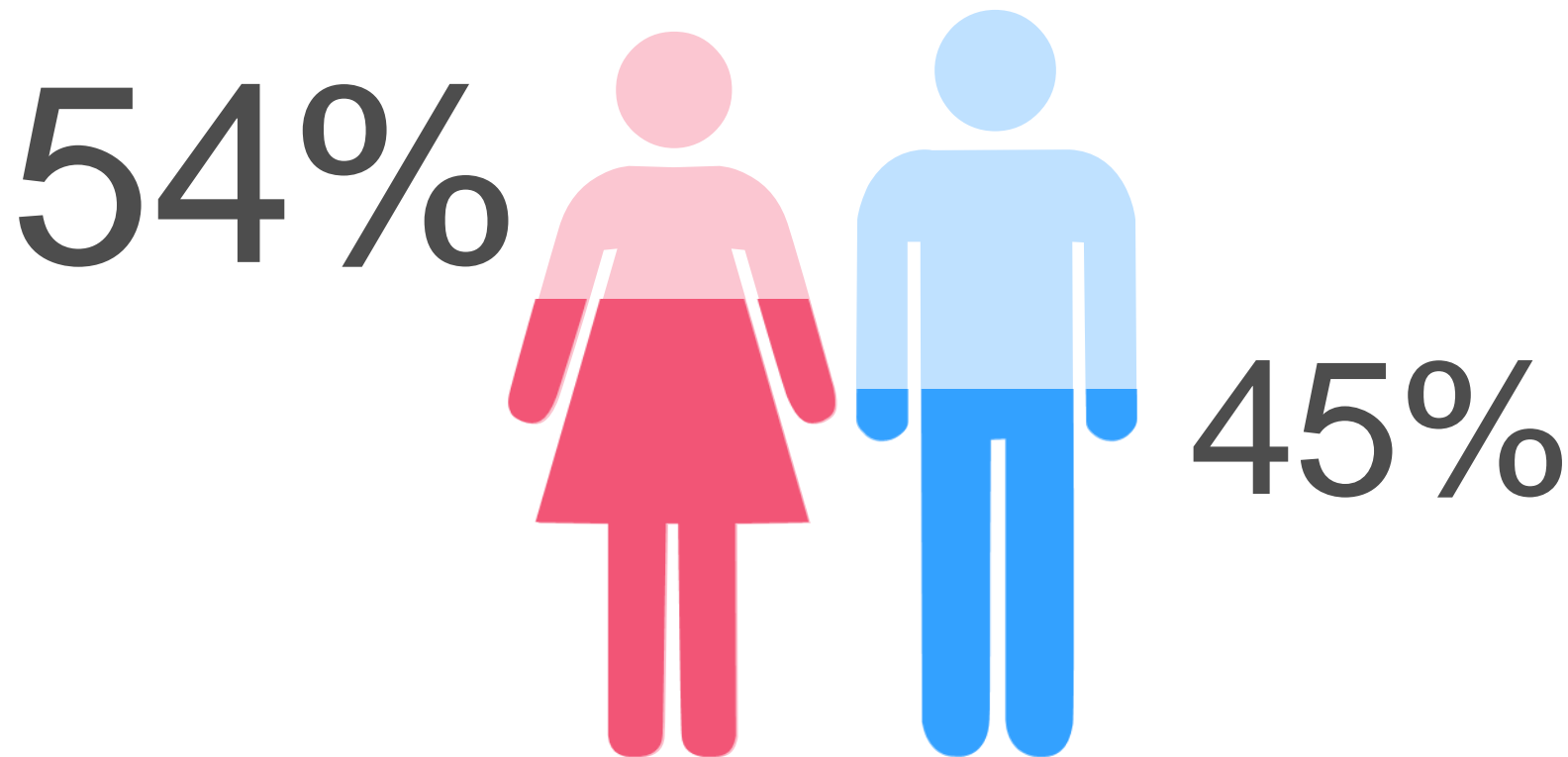


"I enjoy the fun of shopping"



Source: Ipsos PAX Q3 2012 to Q2 2013. 10 markets excluding Tokyo.

Net ownership of all luxury products monitored:



Source: Ipsos PAX Q3 2012 to Q2 2013. 10 markets excluding Tokyo.

A million reasons to raise a glass. Or more.

41%

have consumed alcohol in past 4 weeks

51% amongst top management

Source: Ipsos PAX Q3 2012 to Q2 2013. 10 markets excluding Tokyo.

76% have watched/
read about/ attended sports



93%

Jakarta



87%

Australia



80%

India



Source: Ipsos PAX Q3 2012 to Q2 2013. 10 markets excluding Tokyo.

74% ready to put in extra effort
to meet career goals

81%



Age 25-34

74%



Age 35-44

73%



Age 45-54

63%



Age 55-64

Source: Ipsos PAX Q3 2012 to Q2 2013. 10 markets excluding Tokyo. Figures shown are top-2-box percentages.

51% interested in furthering their education

58%



Age 25-34

51%



Age 35-44

48%



Age 45-54

44%



Age 55-64

Source: Ipsos PAX Q3 2012 to Q2 2013. 10 markets excluding Tokyo. Figures shown are top-2-box percentages.

49%

**strongly agree/ agree
with the statement**

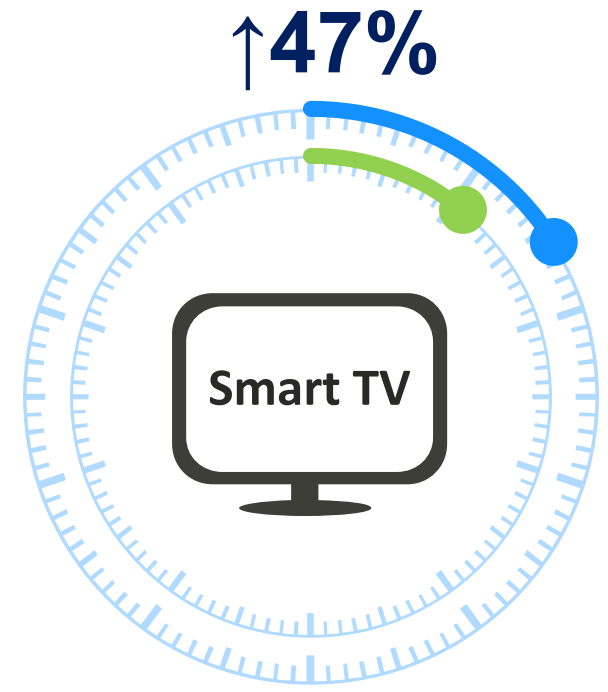
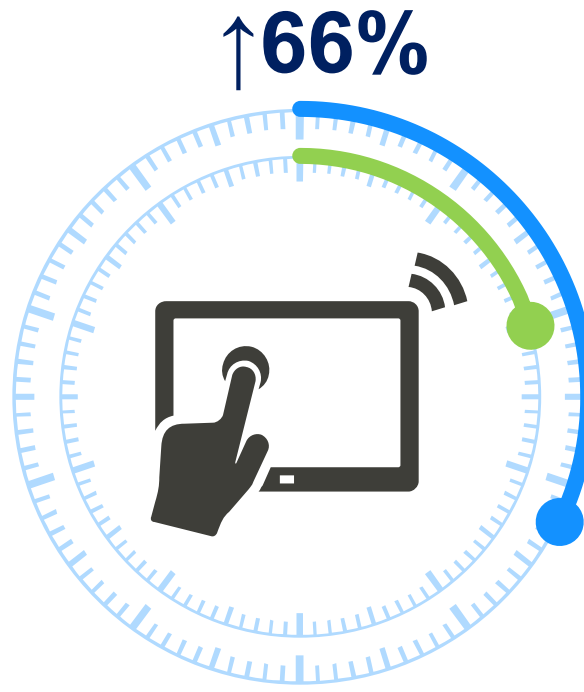
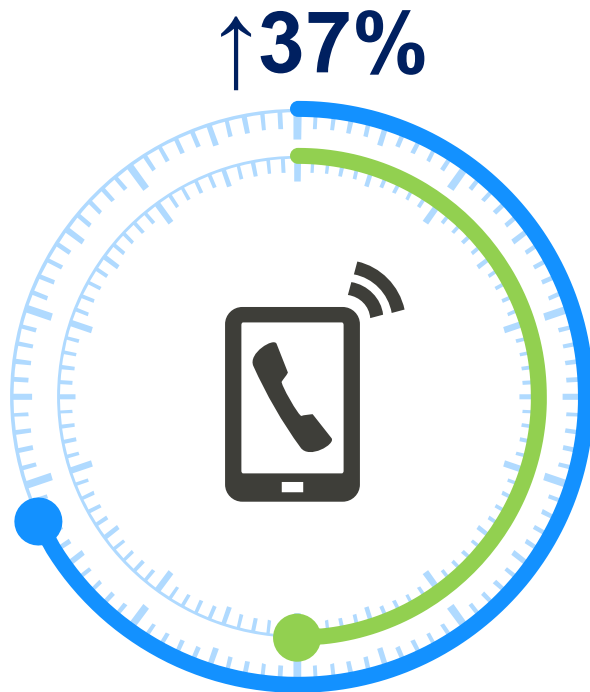
59% agree amongst top management

Source: Ipsos PAX Q3 2012 to Q2 2013. 10 markets excluding Tokyo. Figures shown are top-2-box numbers.

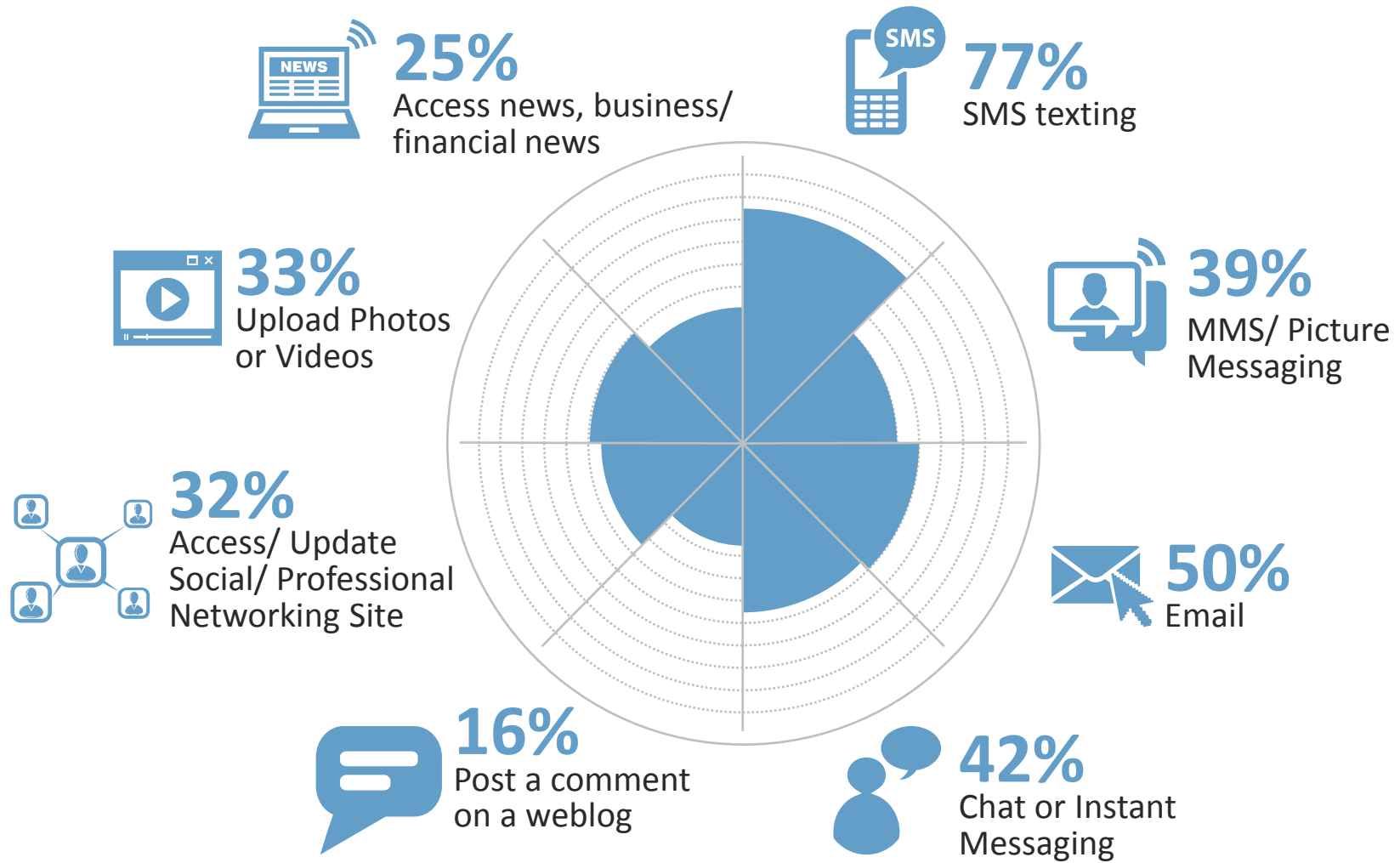
What's hot these days

Ownership % - 2013

Ownership % - 2012



Source: Ipsos PAX Q3 2012 to Q2 2013. 10 markets excluding Tokyo.



Source: Ipsos PAX Q3 2012 to Q2 2013. 10 markets excluding Tokyo.



4.4M

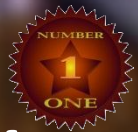
air trips in P12M

22%↑

for ownership of
luxury items

25%↑

increase for museum/
art gallery visits



78%

own an HDTV

260%↑

for flying first/ business class
for business trips

46%↑

have consumed alcohol
in P4W



84%

took 1+ leisure trips
in P12M



92%

smartphone
ownership

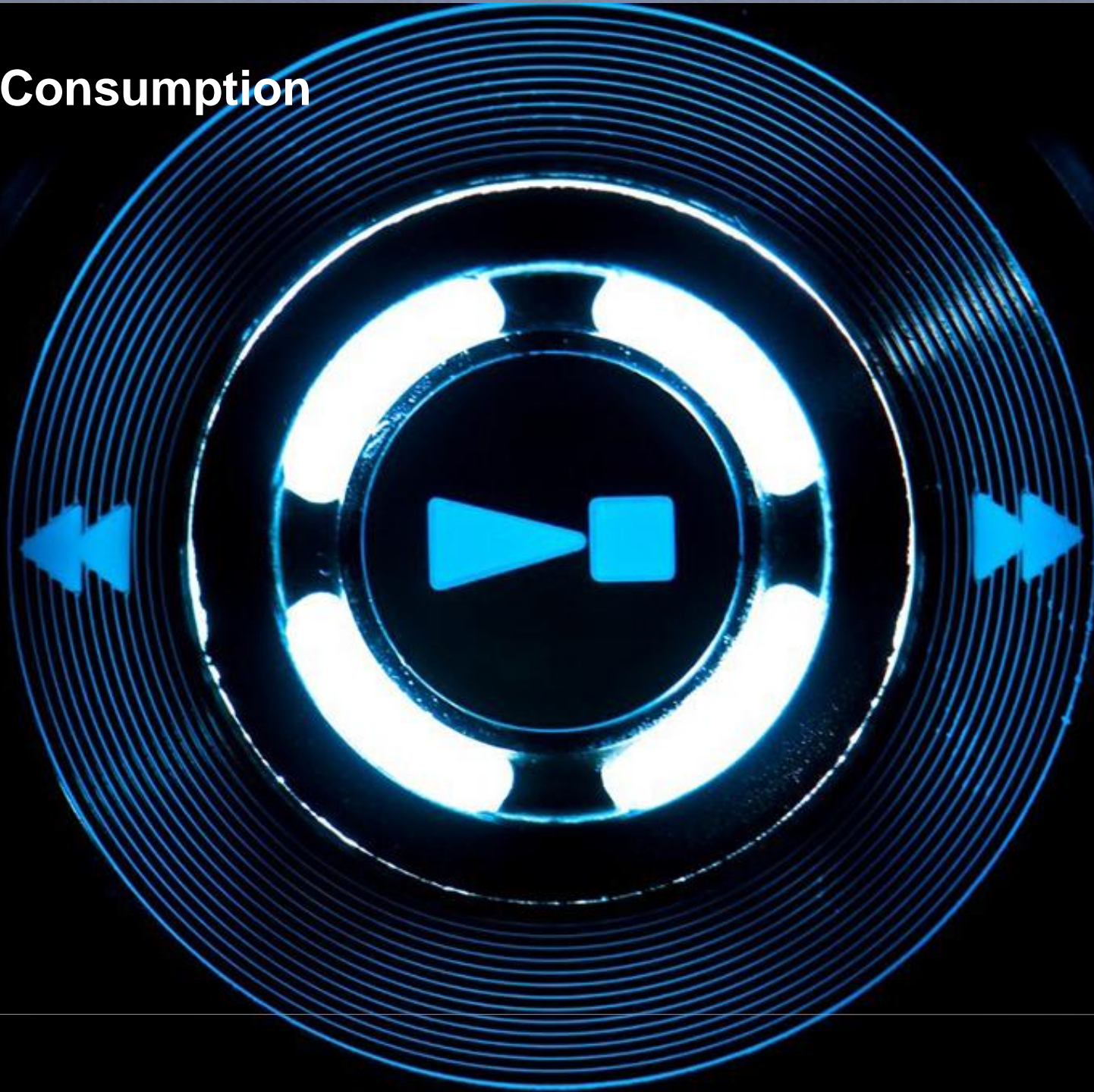
19%↑

for car ownership

41%↑

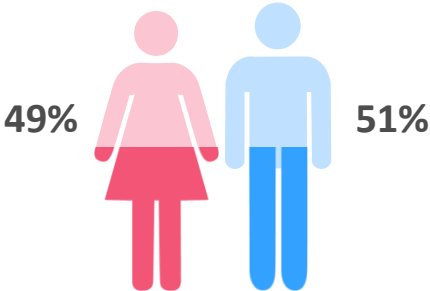
increase for
live theater visits in P6M

Media Consumption

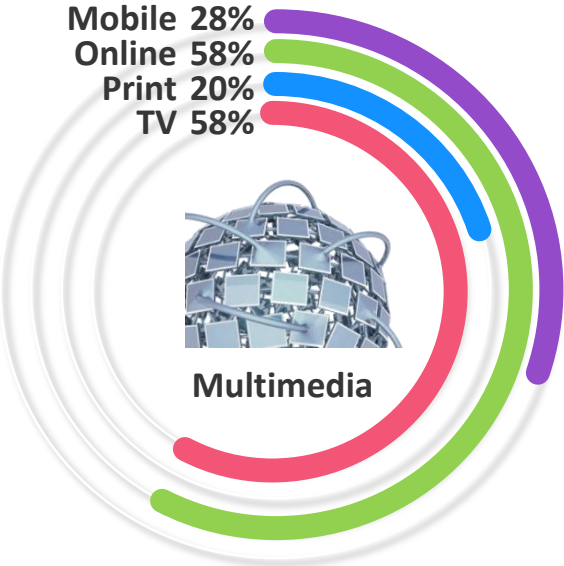


Segment: Private property and car owners

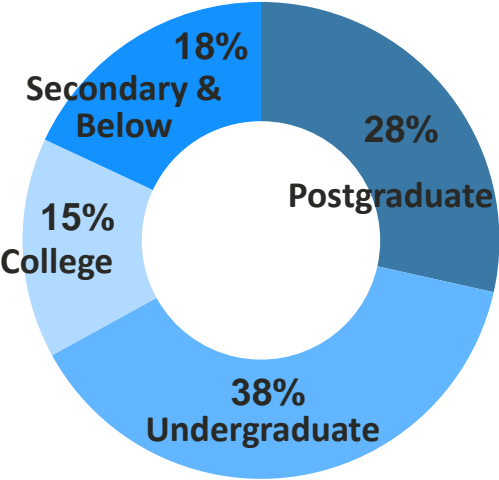
Gender & Age



Average age: 44 years



Education



As a citizen, it is important to contribute to the society

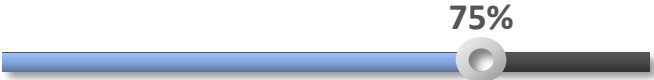
Paying extra for quality is worthwhile

Monthly Income & Investment (Average in USD)

Household Income 7,084

Personal Income 4,489

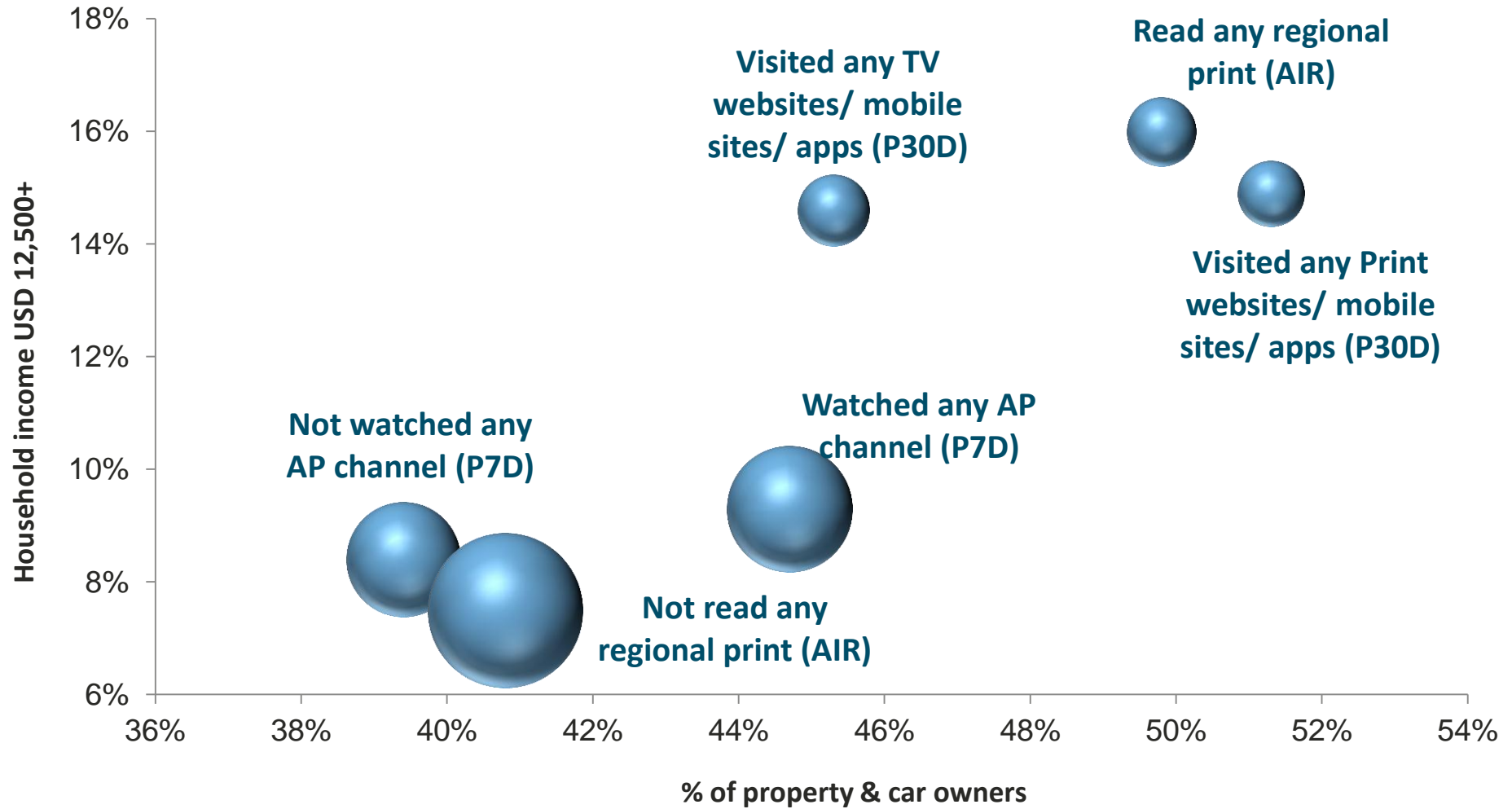
Investment: 191,222



% strongly agree/ agree

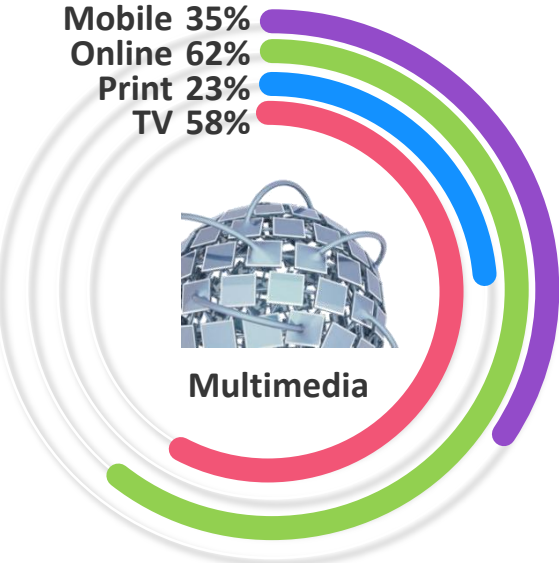
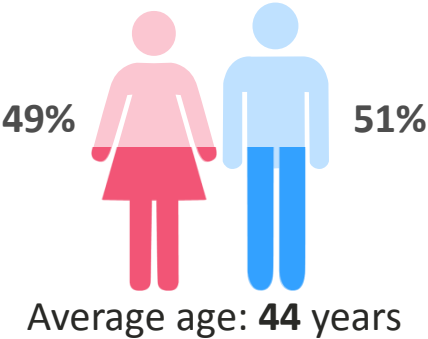
Source: Ipsos PAX Q3 2012 to Q2 2013. 10 markets excluding Tokyo. Private property and car owners are defined as those who own either residential property or property for investment AND own a private car.

The power of regional media for targeting property and car owners

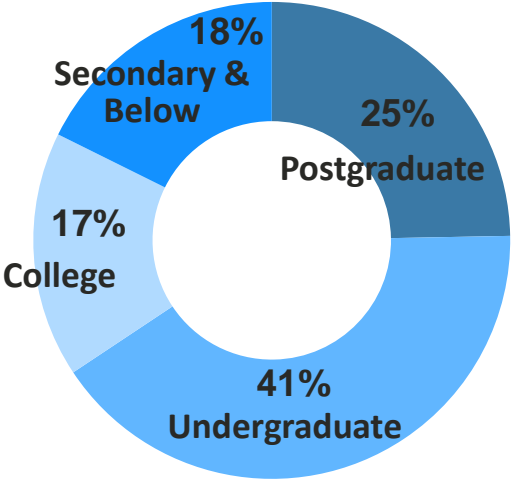


Source: Ipsos PAX Q3 2012 to Q2 2013. 10 markets excluding Tokyo. Private property and car owners are defined as those who own either residential property or property for investment AND own a private car.

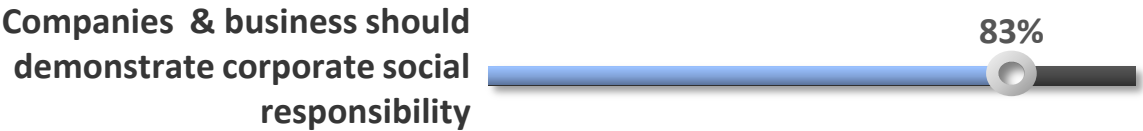
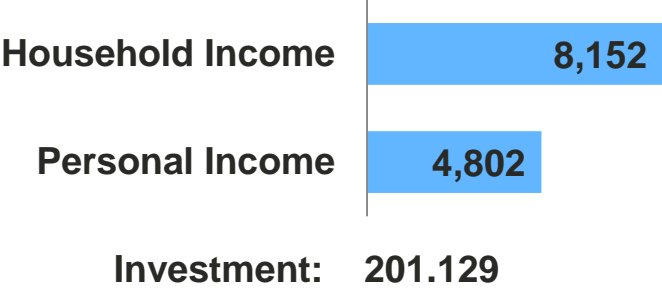
Gender & Age



Education

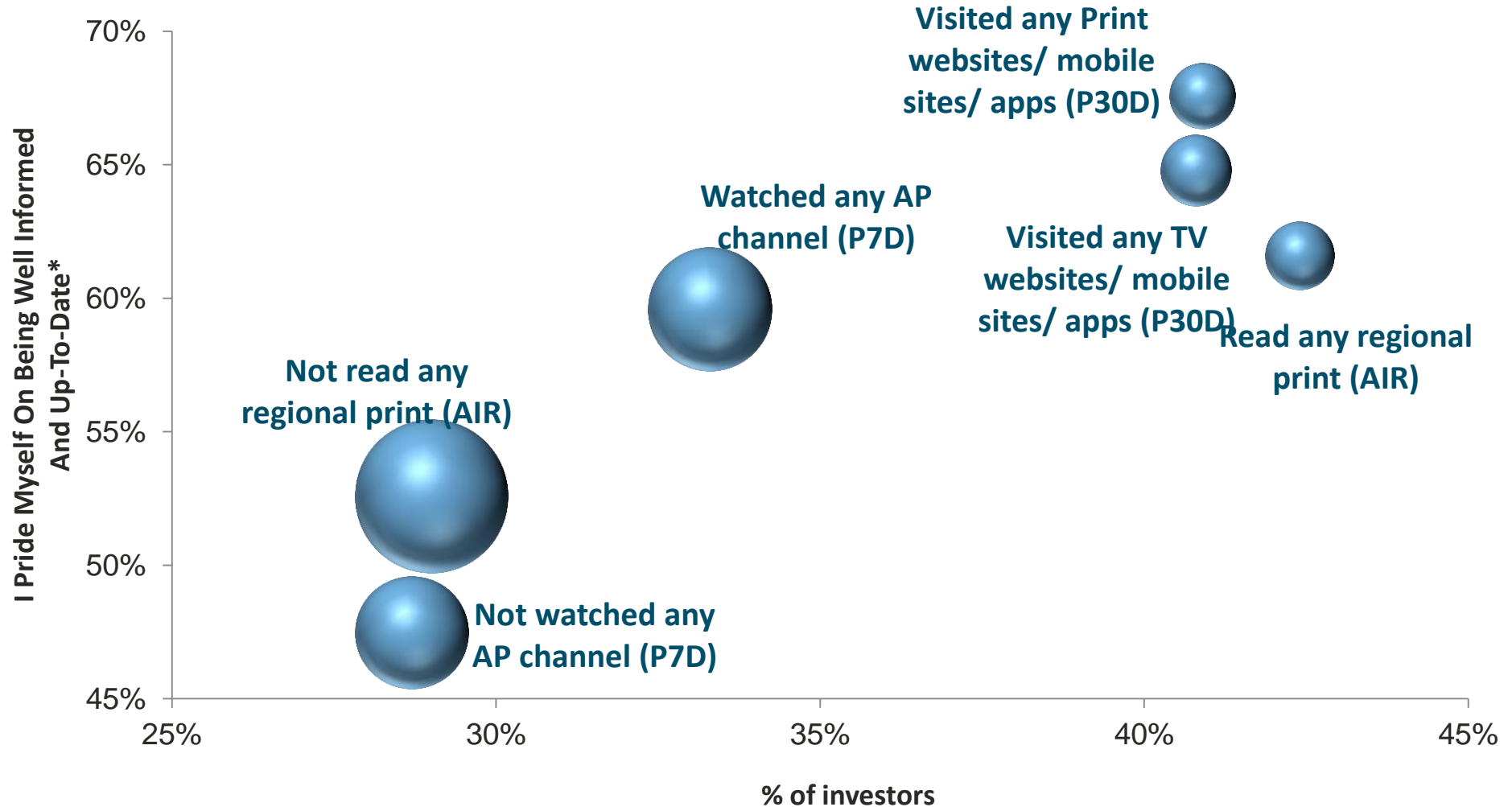


Monthly Income & Investment (Average in USD)



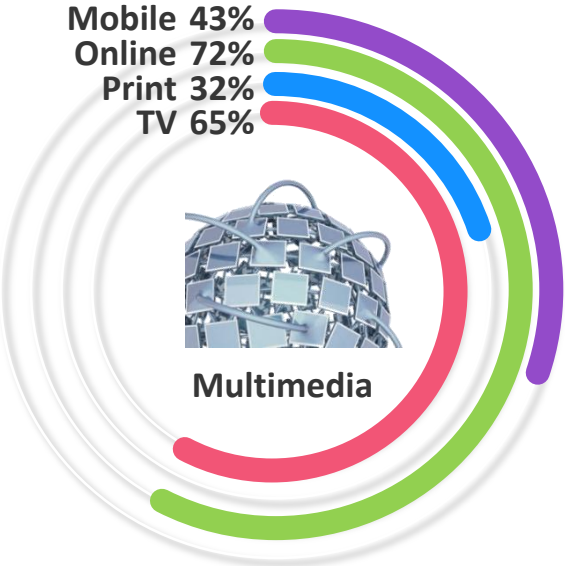
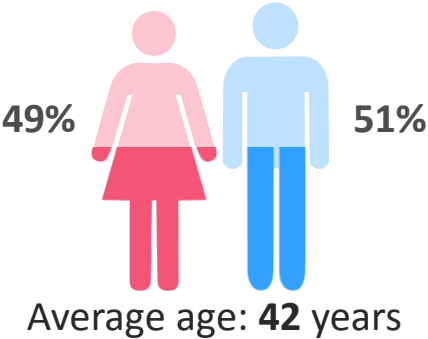
Source: Ipsos PAX Q3 2012 to Q2 2013. 10 markets excluding Tokyo. Financial investors are defined as those who own stocks/ securities/ bonds or have foreign currencies as an investment.

The power of regional media for targeting financial investors

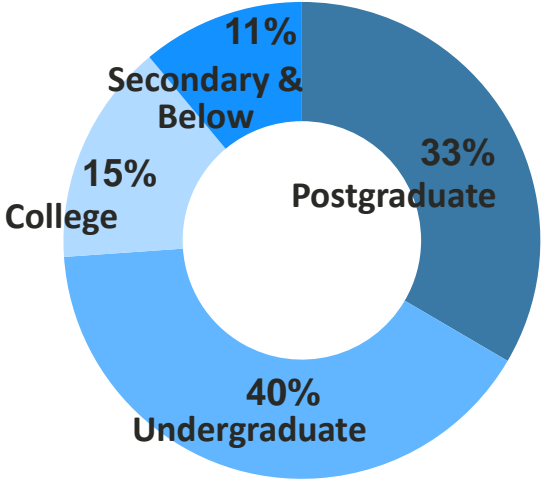


Source: Ipsos PAX Q3 2012 to Q2 2013. 10 markets excluding Tokyo. Financial investors are defined as those who own stocks/ securities/ bonds or have foreign currencies as an investment. * Figures used are top-2-box percentages.

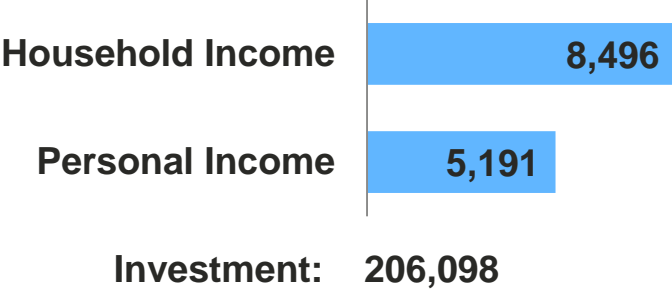
Gender & Age



Education



Monthly Income & Investment (Average in USD)



I care about environment protection



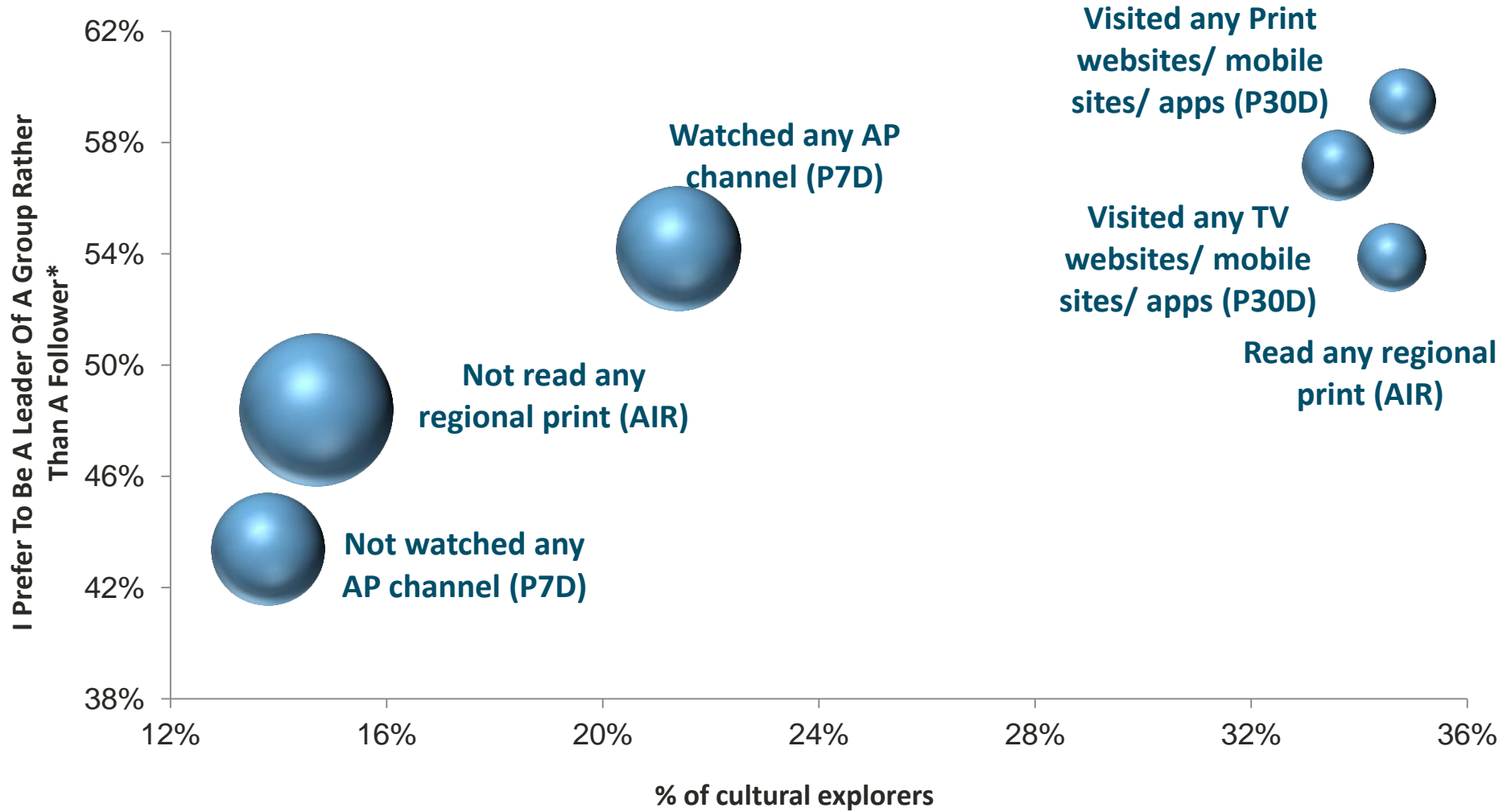
Sometimes I like to treat myself to something special even if it's expensive



% strongly agree/ agree

Source: Ipsos PAX Q3 2012 to Q2 2013. 10 markets excluding Tokyo. Cultural explorers are defined as those who have taken at least 2 international trips in the past 12 months and strongly agree/ agree with "I am interested in exploring more about the culture of other countries"

The power of regional media for targeting cultural explorers



Source: Ipsos PAX Q3 2012 to Q2 2013. 10 markets excluding Tokyo. Cultural explorers are defined as those who have taken at least 2 international trips in the past 12 months and strongly agree/ agree with "I am interested in exploring more about the culture of other countries". * Figures used are top-2-box percentages.

43.3%
Any AP Channels



11.2%
Any TV Website



5.8%
Any TV Content
via Mobile



Net of All Platforms: 47.2%

Source: Ipsos PAX Q3 2012 to Q2 2013. 11 markets total. Any AP Channels is based on P7D viewership; Any TV Website and Any TV Content via Mobile are based on P30D consumption.

16.6%

Any Regional Print



9.8%

Any Print Website



4.8%

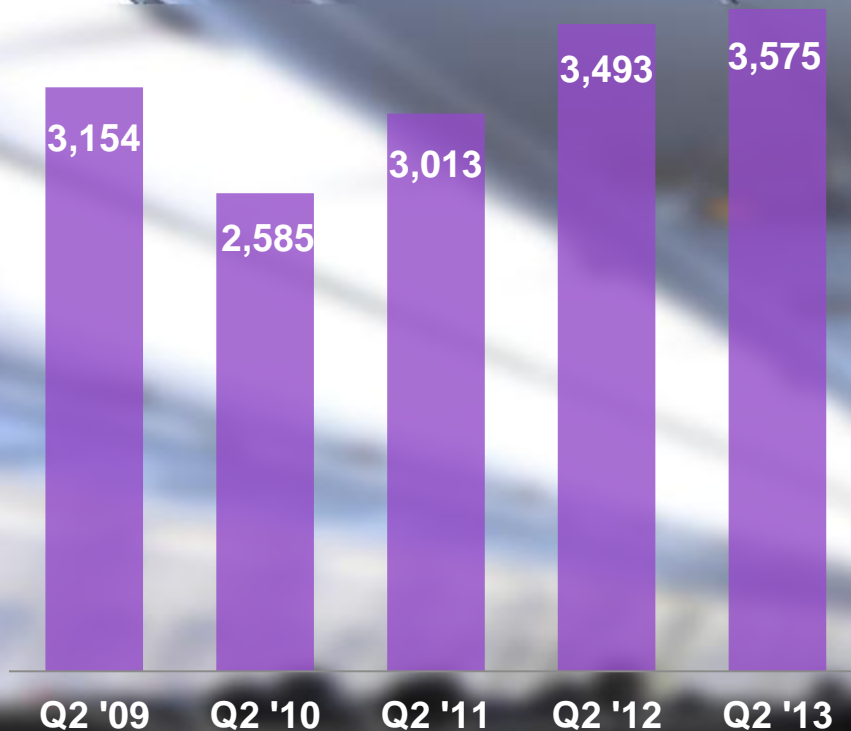
Any Print Content
via Mobile



Net of All Platforms: 23.7%

Source: Ipsos PAX Q3 2011 to Q2 2012. 10 markets excluding Tokyo. Any Regional Print is based on AIR; Any Print Website and Any Print Content via Mobile are based on P30D consumption.

More fun in a captive environment

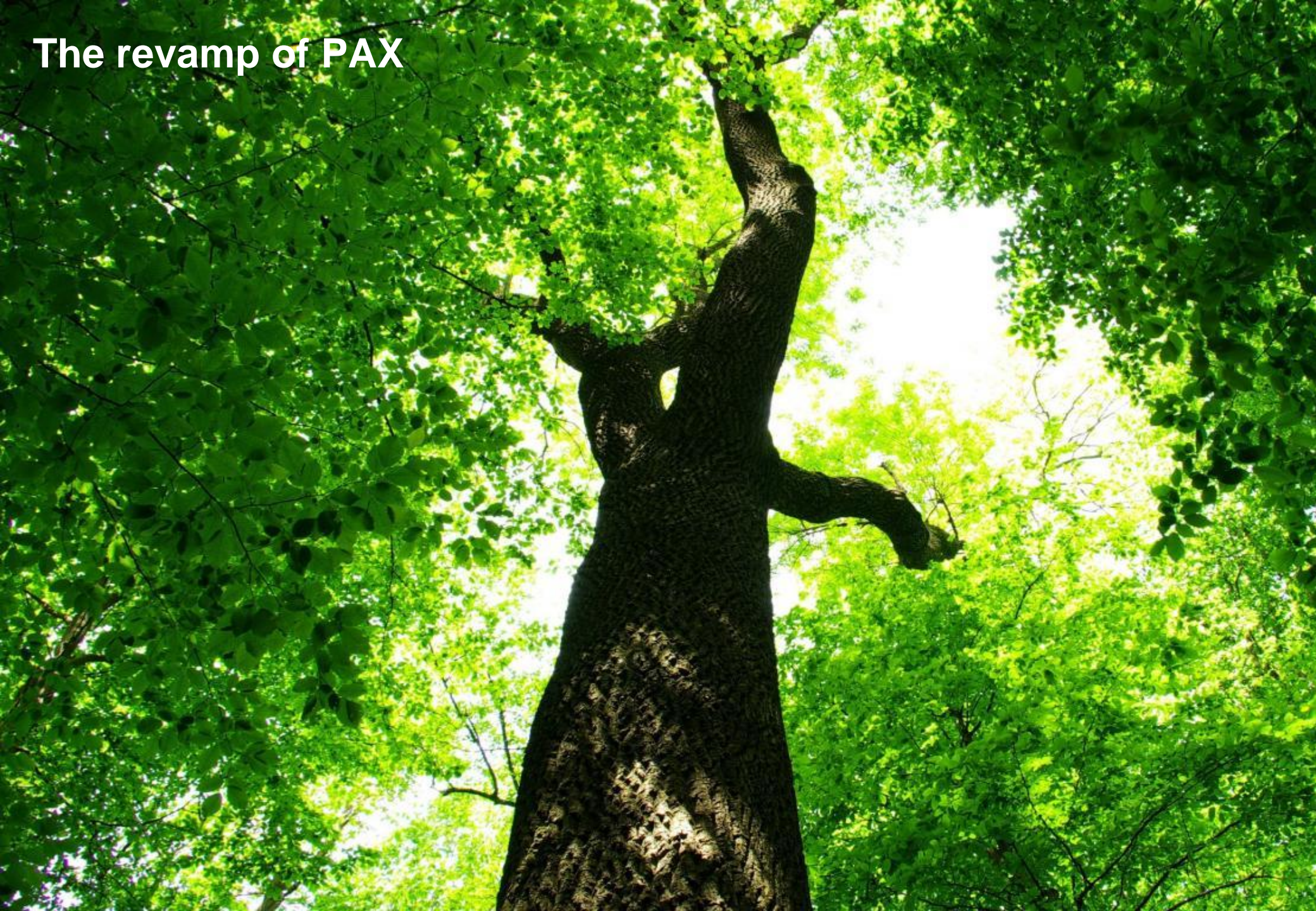


5%↑

inflight magazine reading vs. past year

Source: Ipsos PAX Q3 2012 to Q2 2013. 10 markets excluding Tokyo. Figures shown in chart are number of people who consume inflight entertainment in an average trip (in '000).

The revamp of PAX



Potential respondents are highly elusive





85% have used mobile applications in the past month



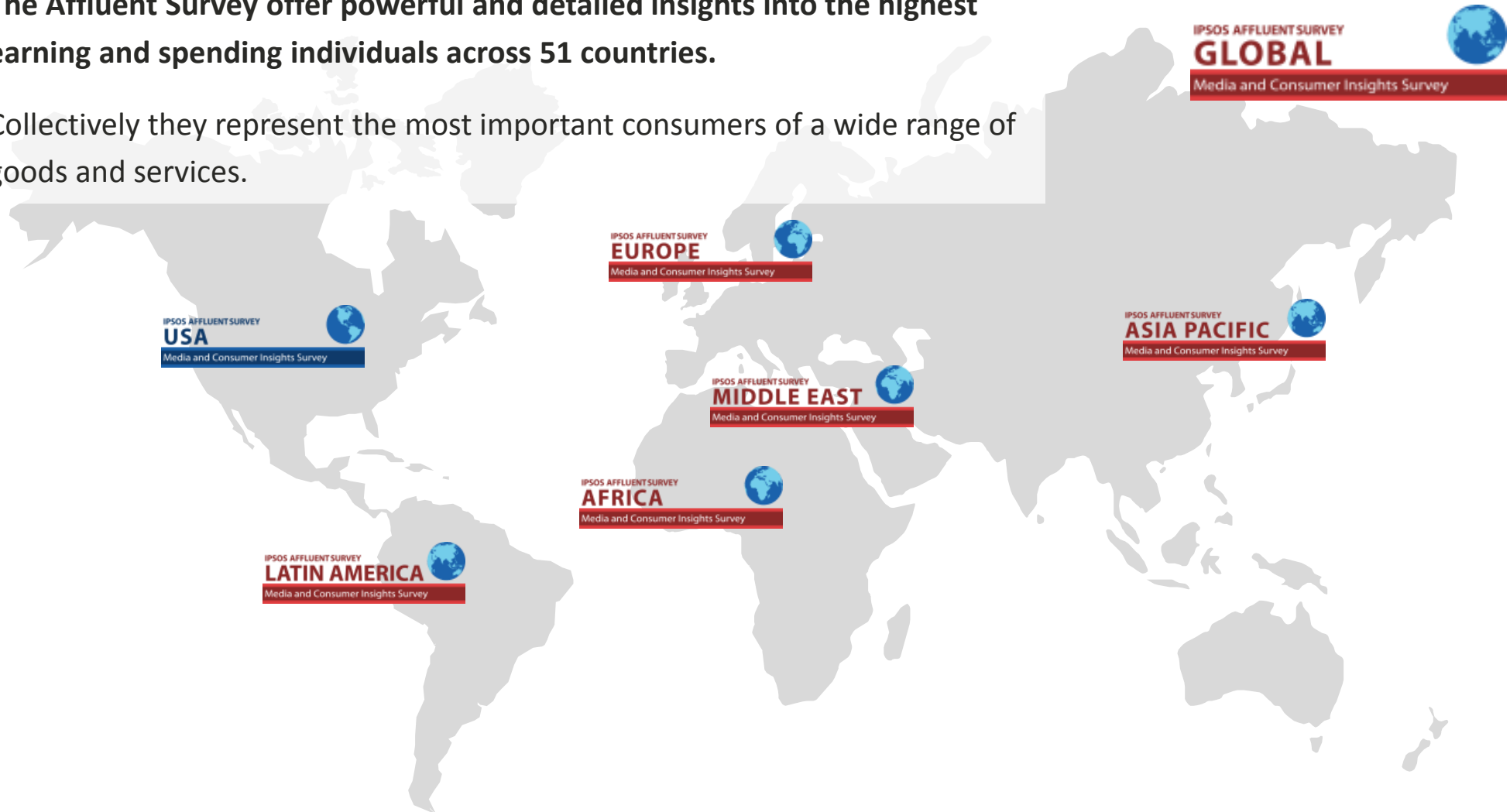
Source: Ipsos PAX Q3 2012 to Q2 2013. 10 markets excluding Tokyo. Based on all respondents.

**Hybrid methodology; introducing online
Multi-platform media brand consumption
2 database releases each year**



The Affluent Survey offer powerful and detailed insights into the highest earning and spending individuals across 51 countries.

Collectively they represent the most important consumers of a wide range of goods and services.



The Business Elite Survey offers a window into the highest reaches of the corporate world across 36 countries.

It helps marketers communicate with this disproportionately important group of people, whose power in the boardroom and as consumers of travel, luxury goods and personal financial services is unparalleled.

IPSOS BUSINESS ELITE SURVEY
BE:USA
Media and Business Insights Survey

IPSOS BUSINESS ELITE SURVEY
BE:EUROPE
Media and Business Insights Survey

IPSOS BUSINESS ELITE SURVEY
BE:GLOBAL
Media and Business Insights Survey

IPSOS BUSINESS ELITE SURVEY
BE:JAPAN
Media and Business Insights Survey

IPSOS BUSINESS ELITE SURVEY
BE:ASIA
Media and Business Insights Survey

IPSOS BUSINESS ELITE SURVEY
BE:MENA
Media and Business Insights Survey

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Media and Business Insights Survey

Thank you for your continued support!

