



20 years of change among Europe's Affluent consumers



The Century Club, London

11 June 2015

1995

1996

1997

1998

1999

2000

2001

Foundations laid by Inter/View & TIME magazine. Initial group of guarantors of advertisers, agencies, publishers & TV networks includes CNN, Eurosport & TIME.

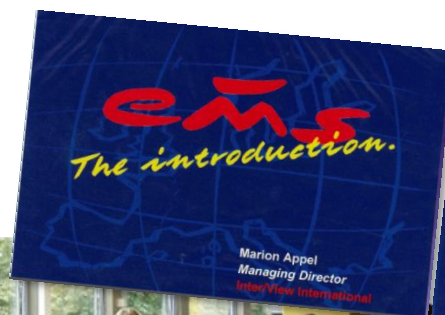
Recontact study
(**EMS Target & Brand**) included,
about familiarity & usage of brands

IPA

EMS receives
IPA seal of Approval

1st release of EMS

Start of
CATI fieldwork
in Amsterdam



Addition of **TV day part data**
for planning TV spots

2002

2003

2004

2005

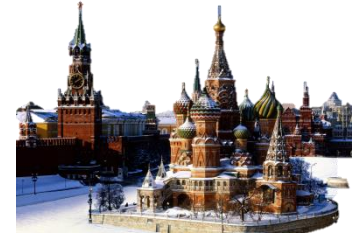
2006

2007



Business Boost added to CATI fieldwork, for boost of top segment of senior managers
(EMS Select Top 3%)

Poland added



Russia added

Czech Rep. & Hungary added

Enhanced
lifestyle/psychographic data

10 year anniversary



Questions about **websites** included in main questionnaire

2008

1st release of
EMS Middle East

2009



1st release of
EMS Africa

2010



Turkey added
to EMS Europe

2011

1st release of
EMS EMEA data

Introduction of
Random Block Design
in Main questionnaire

Addition of
online fieldwork
to EMS Europe

EMS Digital Life:
additional database
with diary data

Introduction of
EMS/comScore
Webplanner



2012

1st release of
EMS Global data
(EMEA + Asia Pacific)

2013



1st release of
Affluent Latin America

2014

19th release
of EMS Europe

2015



20 year anniversary

Introduction of
Digital Currency

Addition of **time dimension**
to **TV R&F data**
by Hartman & Taconet



1st release of
Ipsos Affluent Europe

IPSOS AFFLUENT SURVEY
AFFLUENT | EUROPE



Media and Consumer Insights Survey

IPSOS AFFLUENT SURVEY
AFFLUENT | **EUROPE**



Media and Consumer Insights Survey

IPSOS AFFLUENT SURVEY
AFFLUENT | **USA**



Media and Consumer Insights Survey

IPSOS AFFLUENT SURVEY
AFFLUENT | **ASIA
PACIFIC**



Media and Consumer Insights Survey

IPSOS AFFLUENT SURVEY
AFFLUENT | **LATIN
AMERICA**



Media and Consumer Insights Survey

IPSOS AFFLUENT SURVEY
AFFLUENT | **MIDDLE
EAST**



Media and Consumer Insights Survey

IPSOS AFFLUENT SURVEY
AFFLUENT | **AFRICA**



Media and Consumer Insights Survey

**THE IPSOS
AFFLUENT
SURVEY**

20 YEAR TRENDS

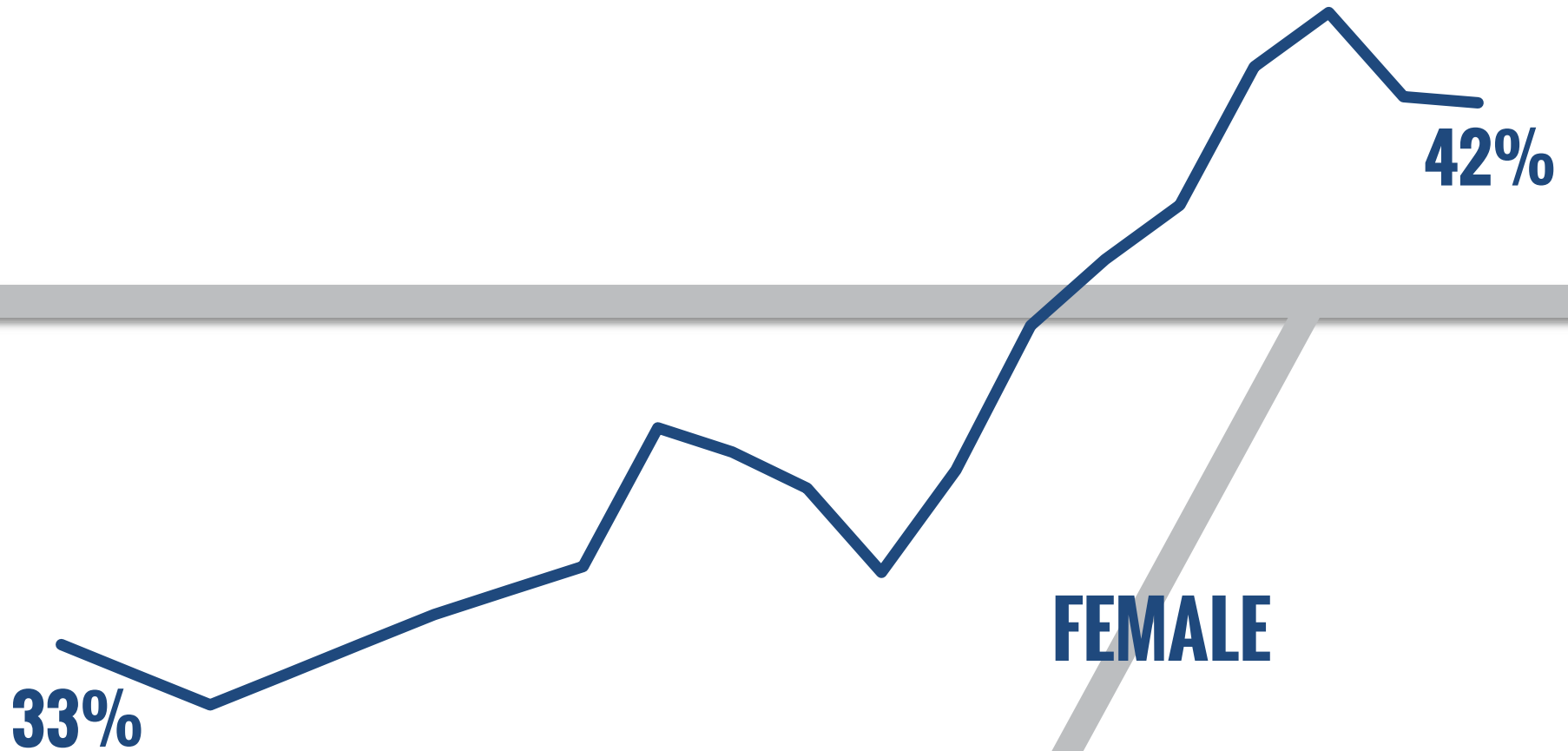
1995

2000

2005

2010

2014



20 YEAR TRENDS

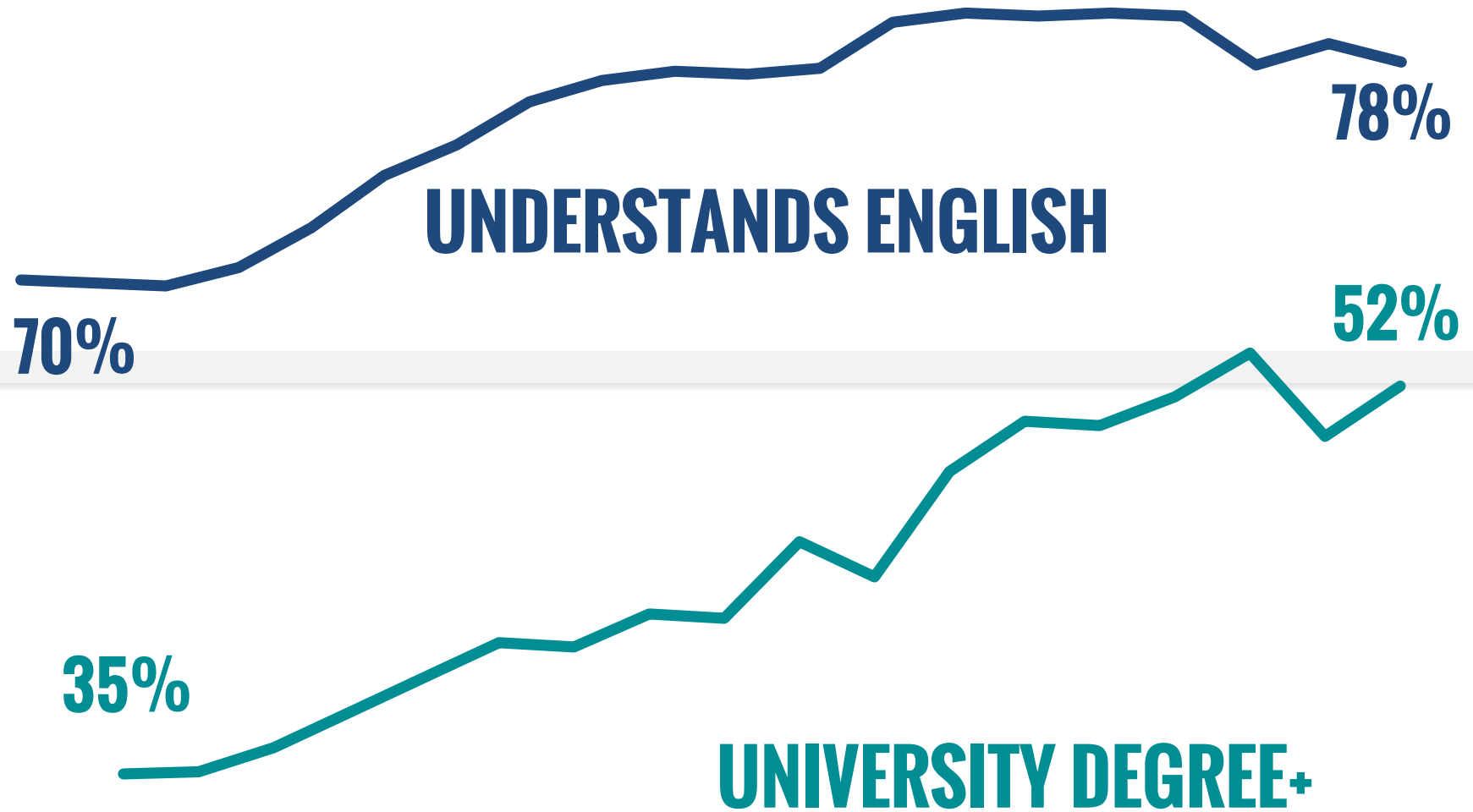
1995

2000

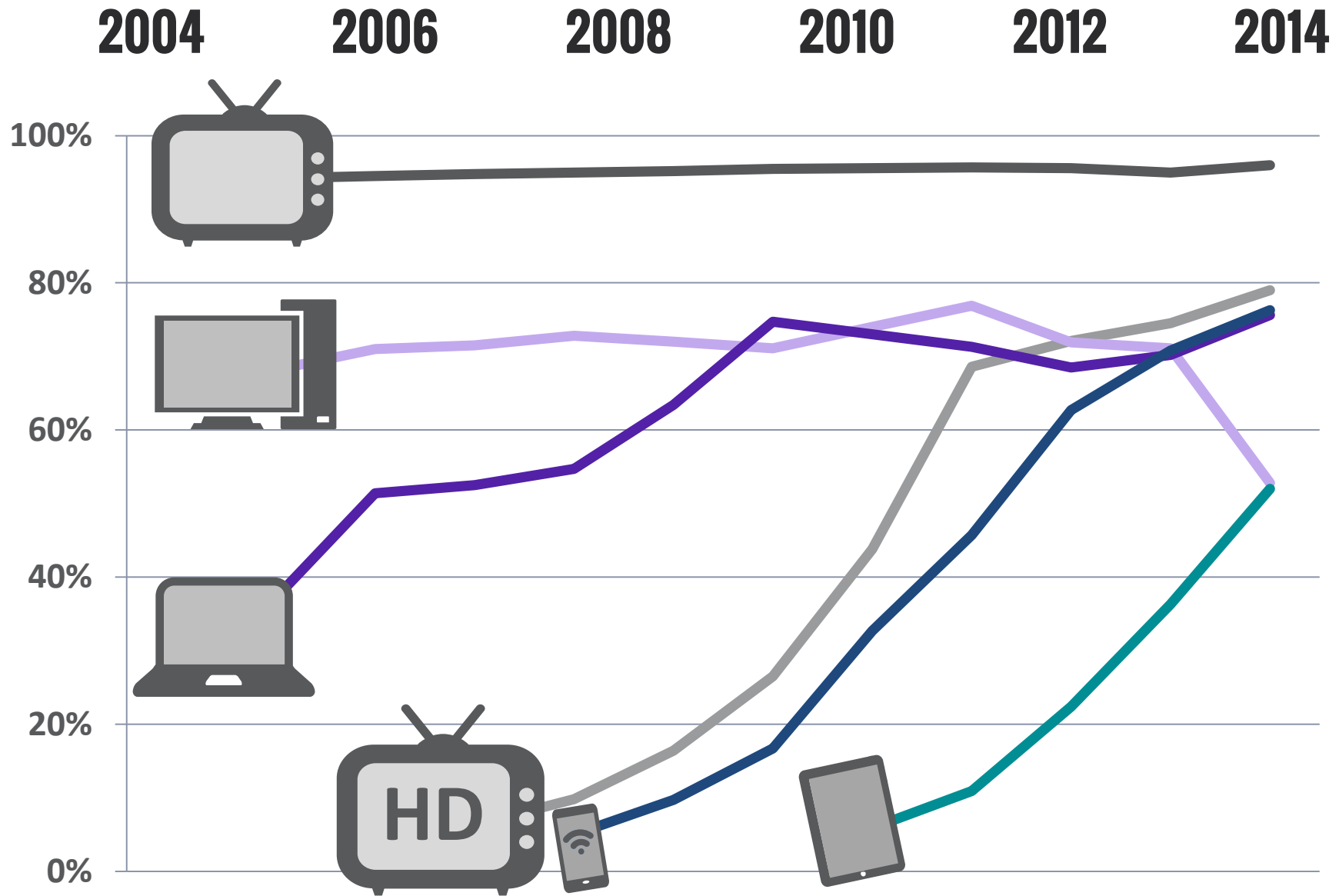
2005

2010

2014



MEDIA DEVICES OWNED



Source: EMS 2004 / Ipsos Affluent 2015
Base: Total, excl. Greece, Czech Rep., Hungary, Poland, Russia & Turkey)

MEDIA CONSUMPTION

2009

2010

2011

2012

2013

2014

135 min.

WATCHING TV

127 min.

USING INTERNET

102 min.

61 min.

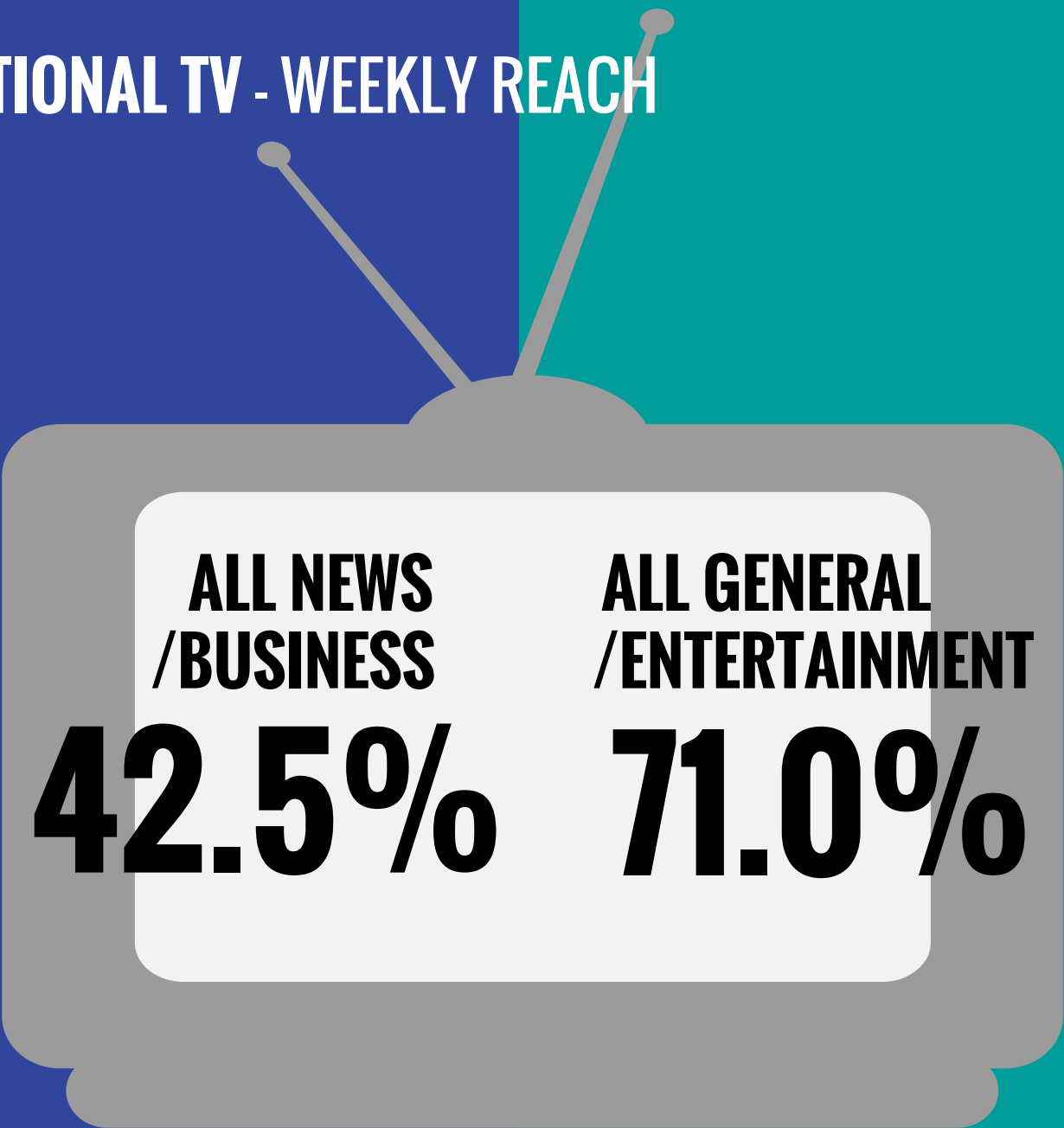
READING NEWSPAPERS & MAGAZINES

54 min.

49 min.

International media results Affluent Europe 2015

INTERNATIONAL TV - WEEKLY REACH



**ALL NEWS
/BUSINESS**

42.5%

**ALL GENERAL
/ENTERTAINMENT**

71.0%

Source: Ipsos Affluent 2015

INTERNATIONAL PRINT - A.I.R.

ALL INTERNATIONAL PRINT

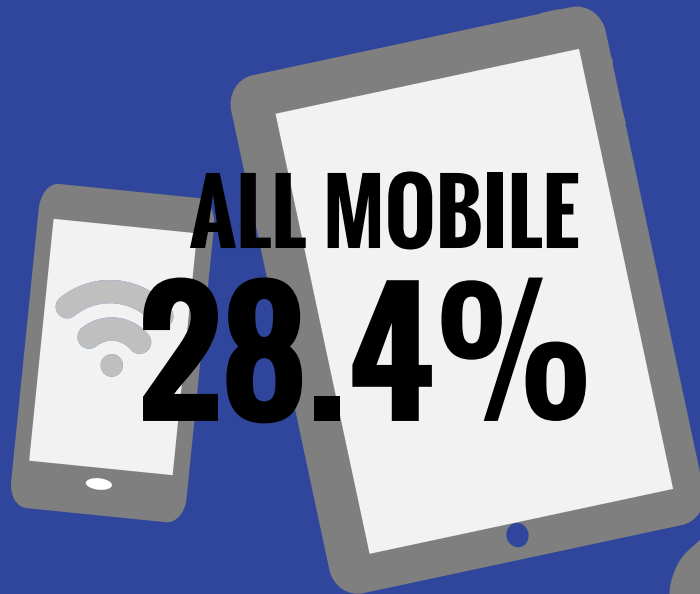
28.7%

Source: Ipsos Affluent 2015

INTERNATIONAL DIGITAL - WEEKLY REACH

ALL INTERNATIONAL DIGITAL

45.6%



ALL MOBILE
28.4%



ALL WEBSITES
36.1%

Source: Ipsos Affluent 2015

INTERNATIONAL BRANDS - WEEKLY REACH + A.I.R.



ALL INTERNATIONAL BRANDS
85.9%

Source: Ipsos Affluent 2015



1995

2000

2005

2010

2015

20 YEARS



THE EUROPEAN MEDIA AND MARKETING SURVEY

IPSOS AFFLUENT SURVEY

AFFLUENT | EUROPE



Media and Consumer Insights Survey



FUTURE

Making sense of fragmented media

Adopt brand centric approach

Add media brand engagement measures

Ask less questions, generate more answers

Shorter and userfriendly interviews

Investigate passive collection

Be the experts in the affluent field

Insights in Affluent behaviour

Regular updates of interest to the wider market



TIME



Bloomberg
TELEVISION



Bloomberg
Businessweek



The
Economist



REUTERS

HAVAS MEDIA



TV5MONDE

THE WALL STREET JOURNAL

ZenithOptimedia
The ROI Agency



sky NEWS

FINANCIAL TIMES



HAKUHODO



Bloomberg
Markets

MEDIACOM



Forbes

dentsu
AEGIS
network

MINDSHARE



The New York Times



Starcom



Lagardère