

IPSOS AFFLUENT SURVEY
AFFLUENT | **EUROPE**



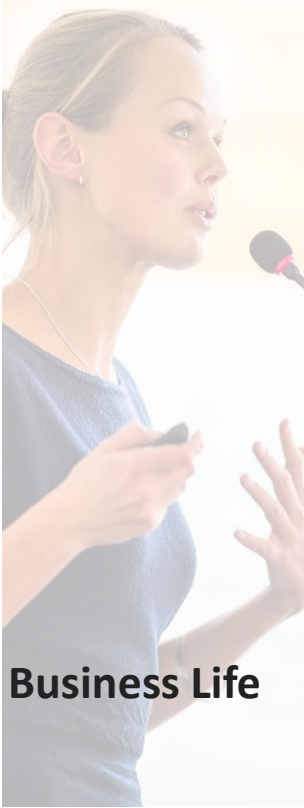
Media and Consumer Insights Survey

“There is nothing average about Europe’s Affluent”

Ipsos Affluent Survey Europe 2016

FACTS AND FIGURES

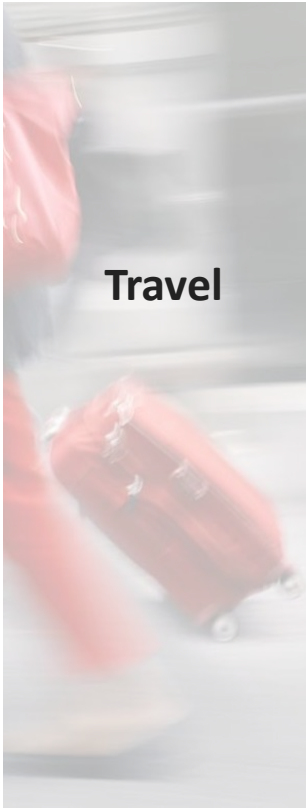
Affluent life



Business Life



Leisure



Travel



Device Ownership



Product Ownership



Media consumption

21 European countries

Top 13%



Universe: 52,155,000

Affluent: Not average

Millennials
8.8 mln

Uploaders
8.6 mln



Baby boomers
18.2 mln

Globe trotters
6.6 mln

Affluent: Millennials



Mean age: **29 years**



Mean personal income: **€44,384**



University degree or higher: **67%**



Mean hours per week: **45**

Self employed: **16%**

In paid employment: **81%**



Second home: **36%**



Affluent definition: age 21-34

Affluent: Baby boomers



Mean age: **59 years**



Mean personal income: **€52,994**



University degree or higher: **49%**



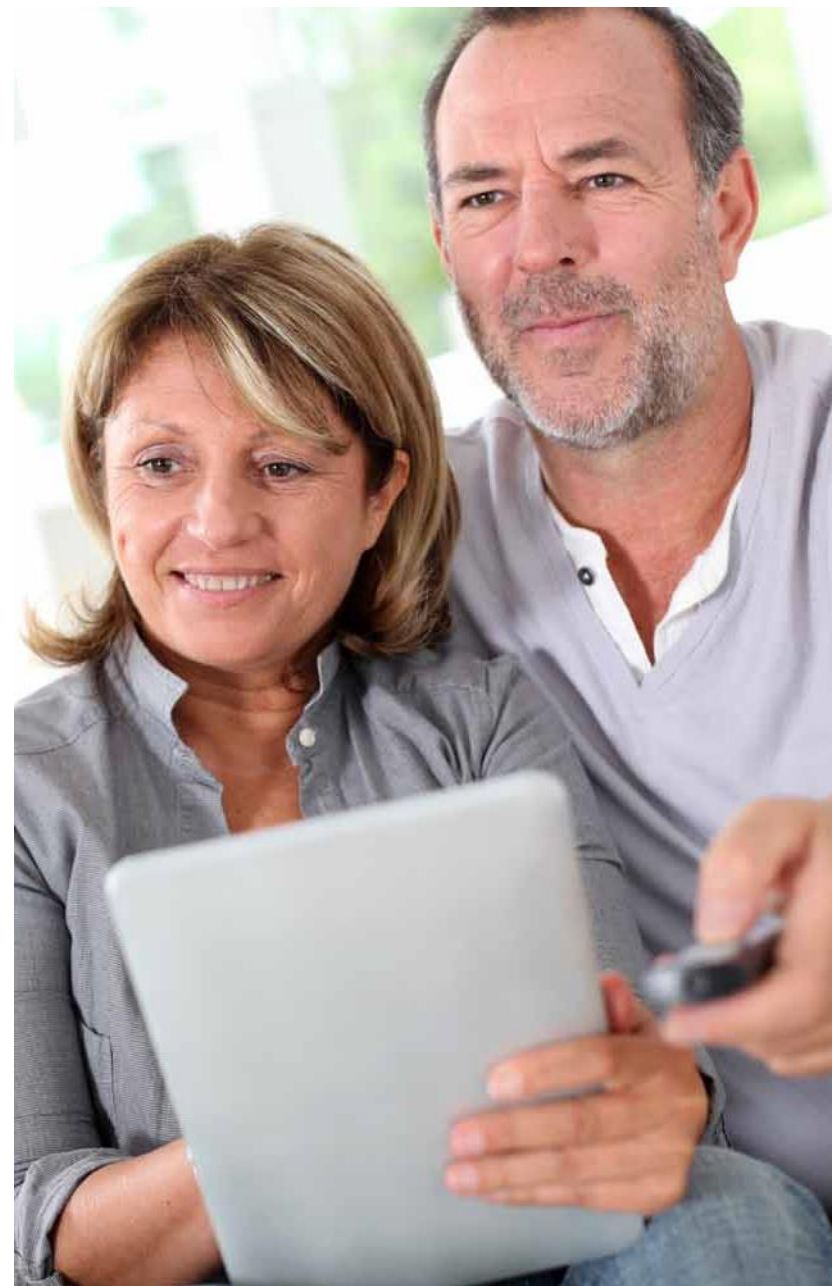
Mean hours per week: **37**

Self employed: **19%**

In paid employment: **57%**



Second home: **34%**



Affluent definition: age 52-70

Affluent: Uploaders



Mean age: **42 years**



Mean personal income: **€51,558**



University degree or higher: **64%**



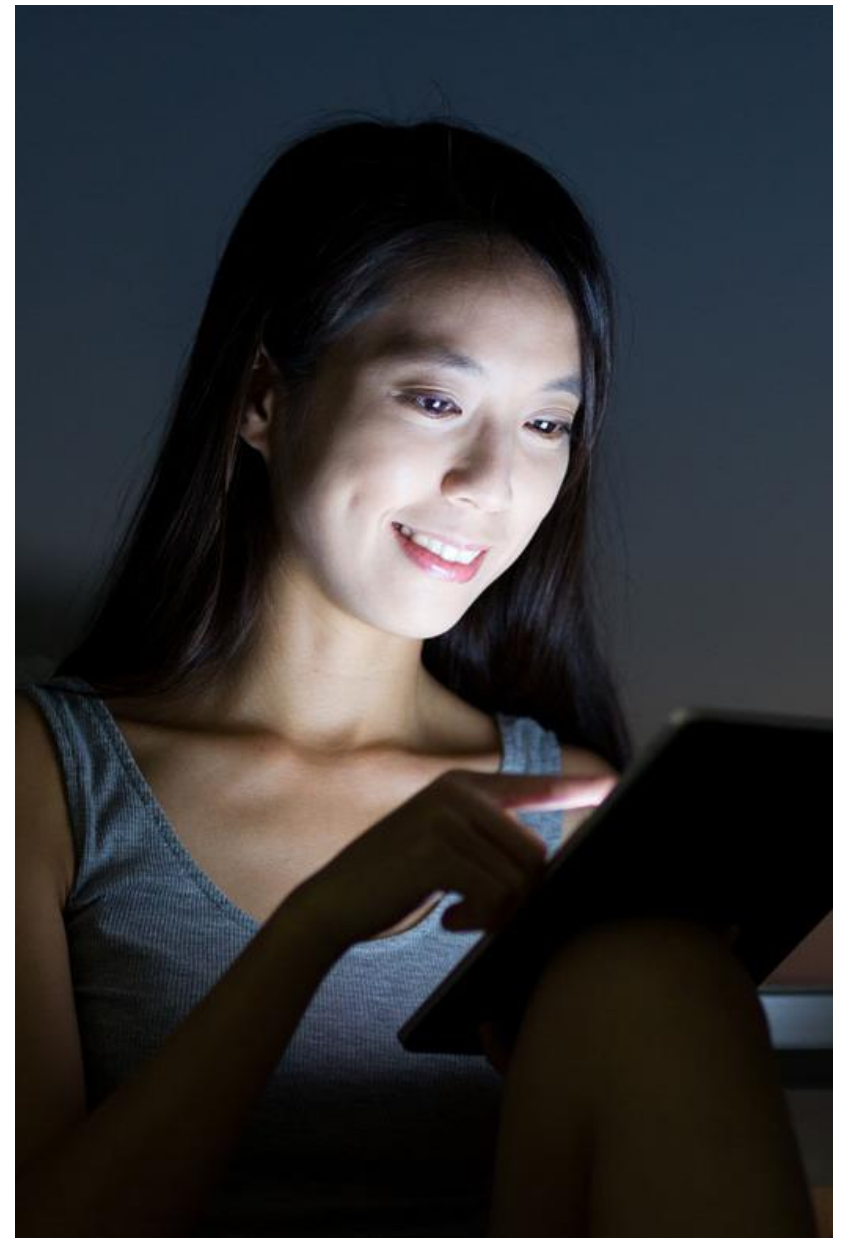
Mean hours per week: **45**

Self employed: **23%**

In paid employment: **67%**



Second home: **51%**



Affluent definition: Time spent yesterday 15+ mins, contributing any content to the internet

Affluent: **Globe trotters**



Mean age: **45 years**



Mean personal income: **€79,027**



University degree or higher: **68%**



Mean hours per week: **48**

Self employed: **25%**

In paid employment: **67%**



Second home: **48%**



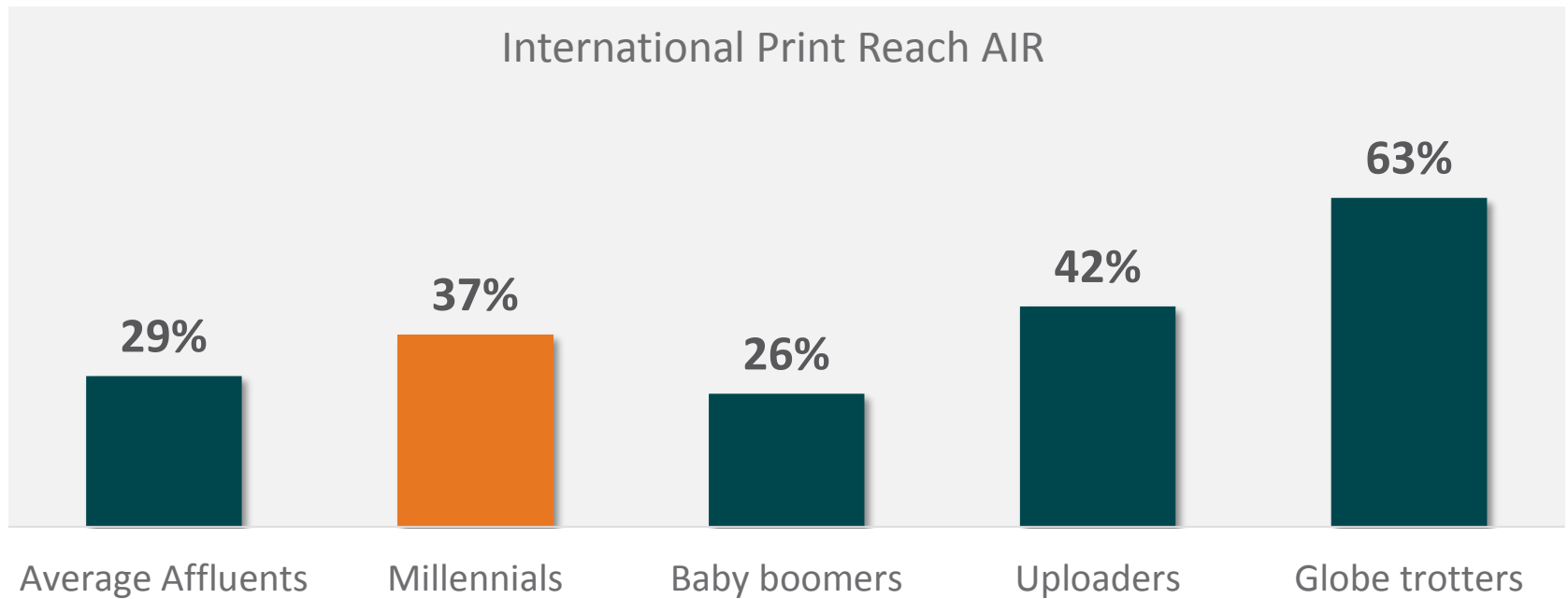
Affluent definition: 6+ Int. air trips

AFFLUENT: NOT AVERAGE

Millennials still love print



Millennials read **53** minutes a day
Baby boomers read **51** minutes a day
Uploaders read **62** minutes a day
Globe trotters read **62** minutes a day



Base: Total Affluent Europe 2016

GAME CHANGERS

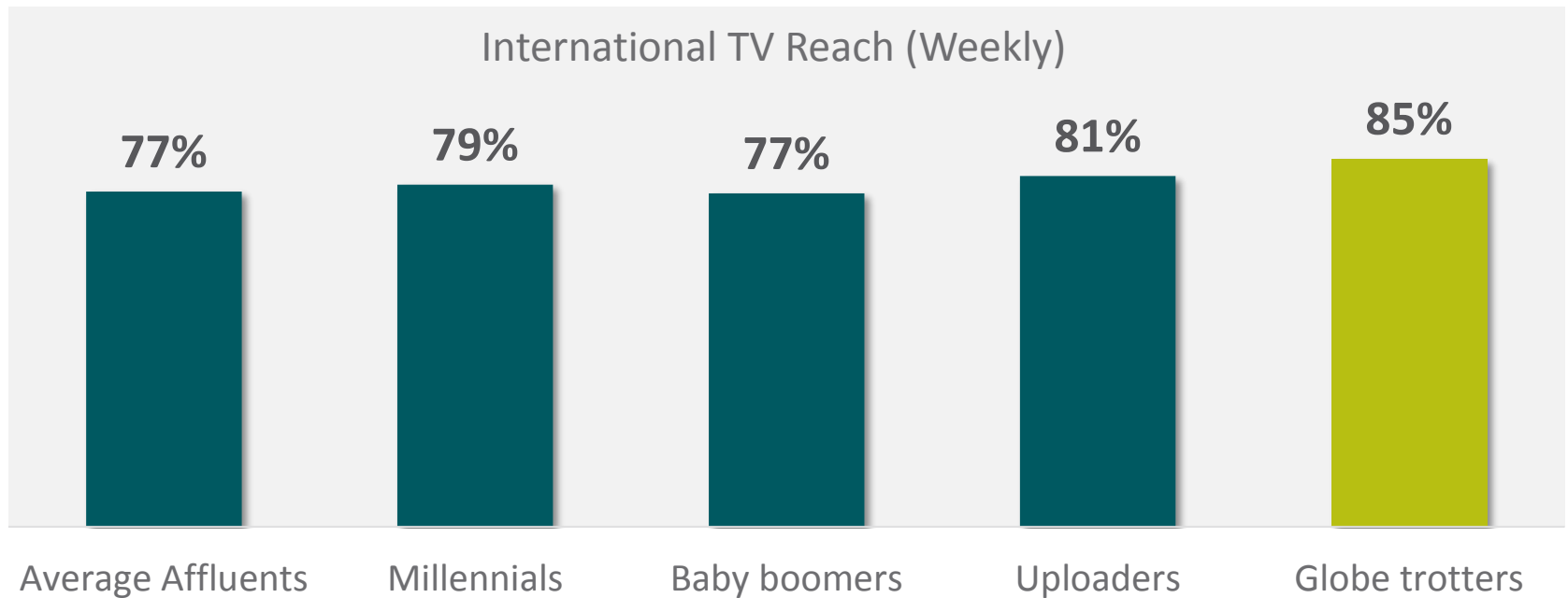


AFFLUENT: NOT AVERAGE

Globe trotters watch less TV, but are highest consumers of International TV



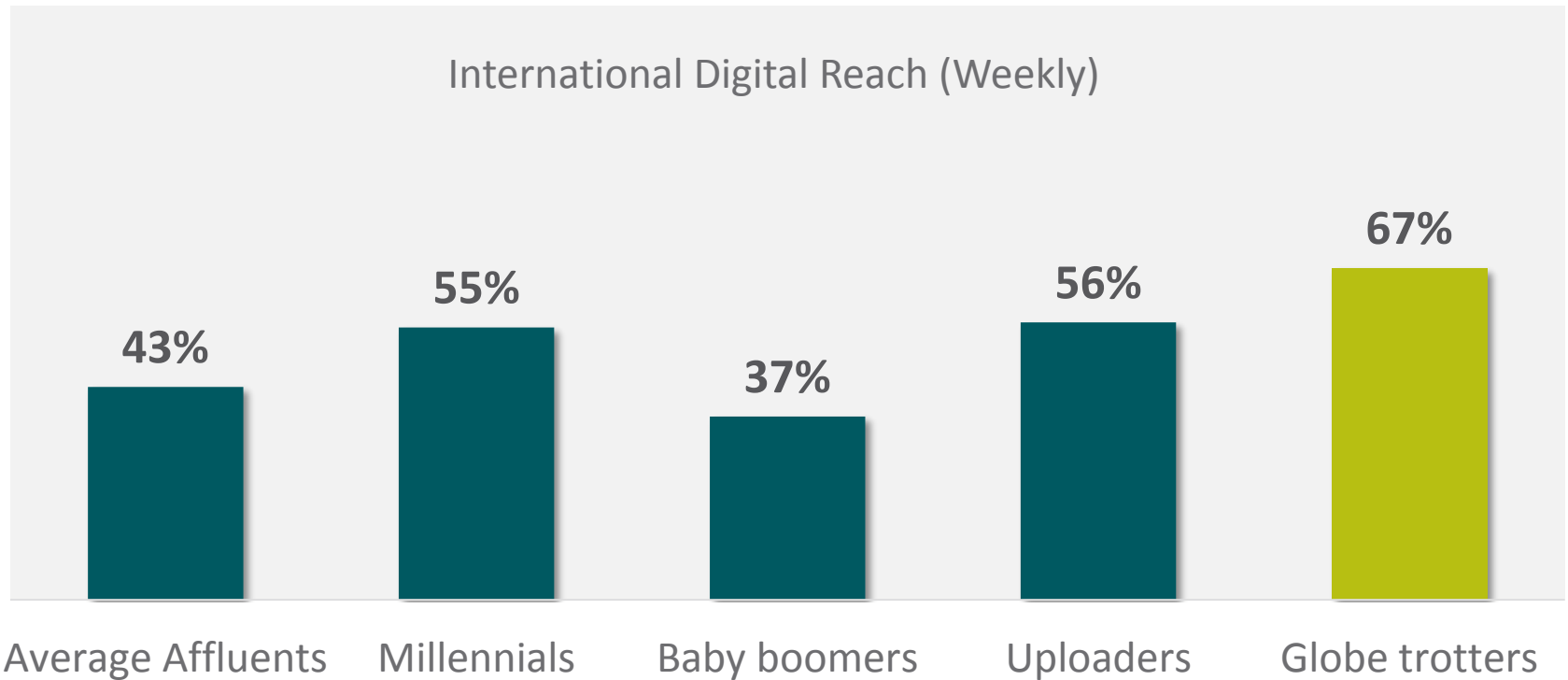
Millennials watch **132** minutes per day
Baby boomers watch **128** minutes per day
Uploaders watch **133** minutes per day
Globe trotters watch **126** minutes per day



Base: Total Affluent Europe 2016

AFFLUENT: NOT AVERAGE

Globe trotters are heavy consumers of international digital media



Base: Total Affluent Europe 2016

GAME CHANGERS



AFFLUENT: NOT AVERAGE

Millennials spend more time online but are more passive

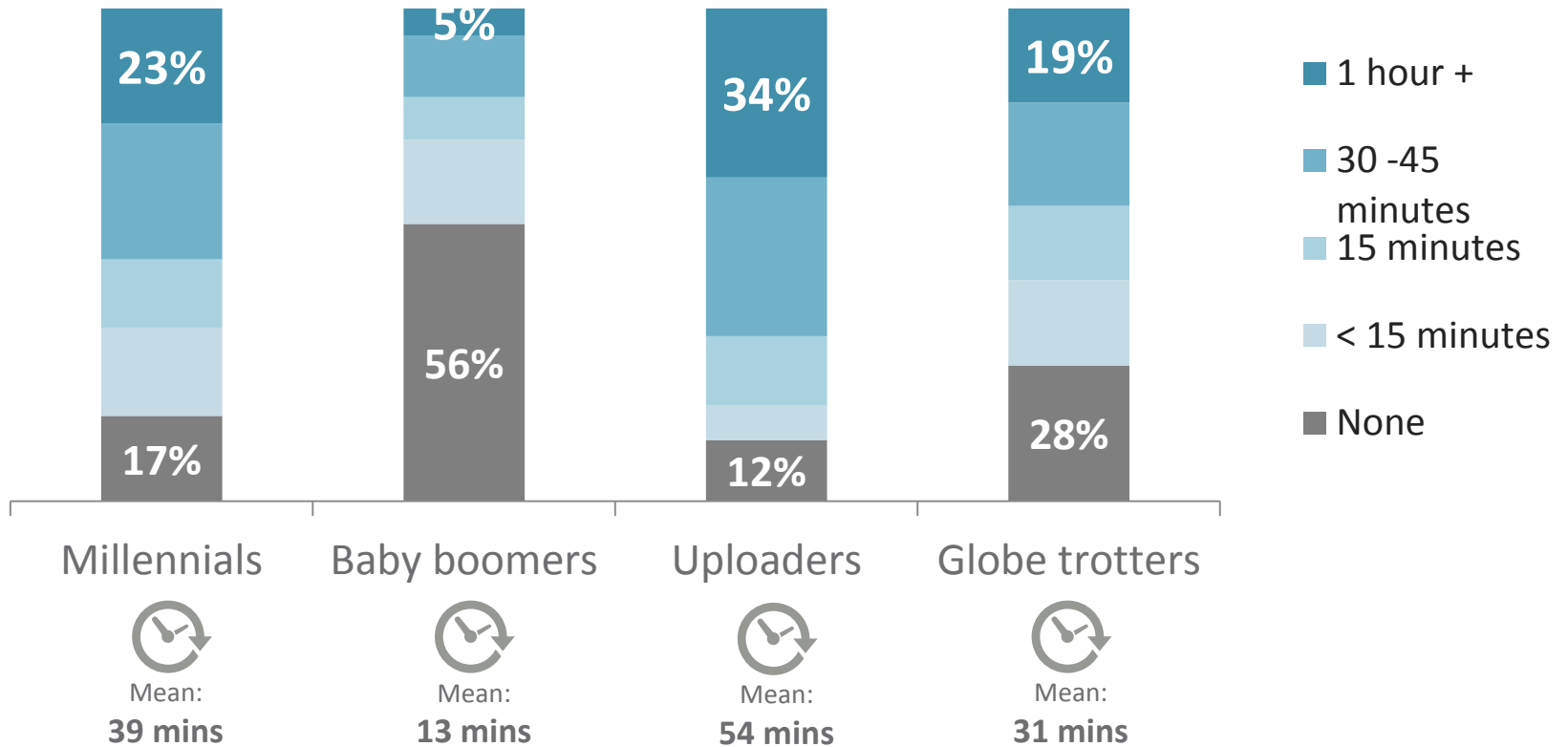


Millennials use **157** minutes per day
Baby boomers use **87** minutes per day
Uploaders use **147** minutes per day
Globe trotters use **134** minutes per day

AFFLUENT: NOT AVERAGE

Uploaders spend less time online than millennials but more time on social media

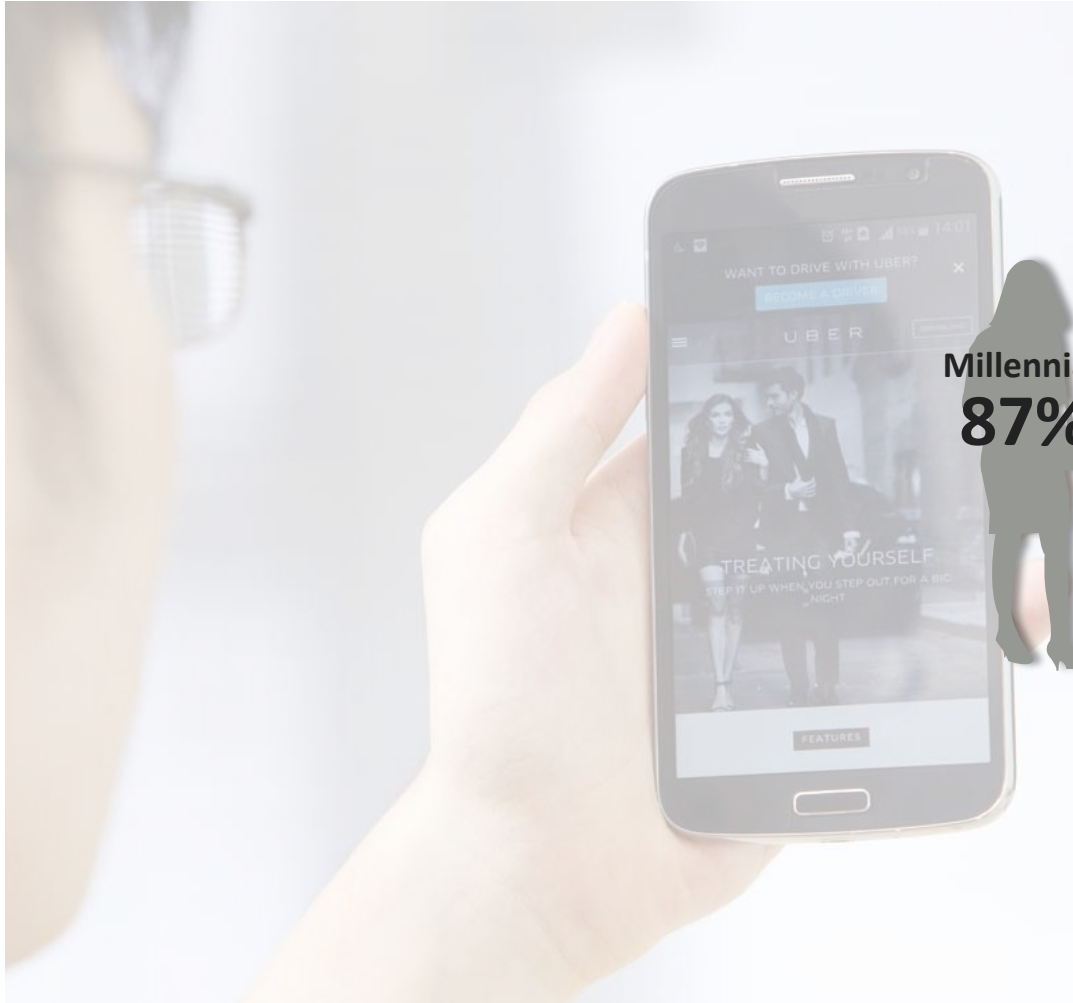
Time spent yesterday on online social networking, chat or instant messaging



Base: Total Affluent Europe 2016

AFFLUENT: NOT AVERAGE

Smartphone ownership almost universal



Own smartphone

Millennials
87%

Baby boomers
80%

Uploaders
81%

Globe trotters
87%

Total Affluent
84%

AFFLUENT: NOT AVERAGE

Tablet ownership



57% of Millennials
34% of Baby boomers

“ Mobile technology is central in my everyday activities ”

Own tablet

Millennials
61%

Baby boomers
52%

Uploaders
67%

Globe trotters
68%

Total Affluent
59%

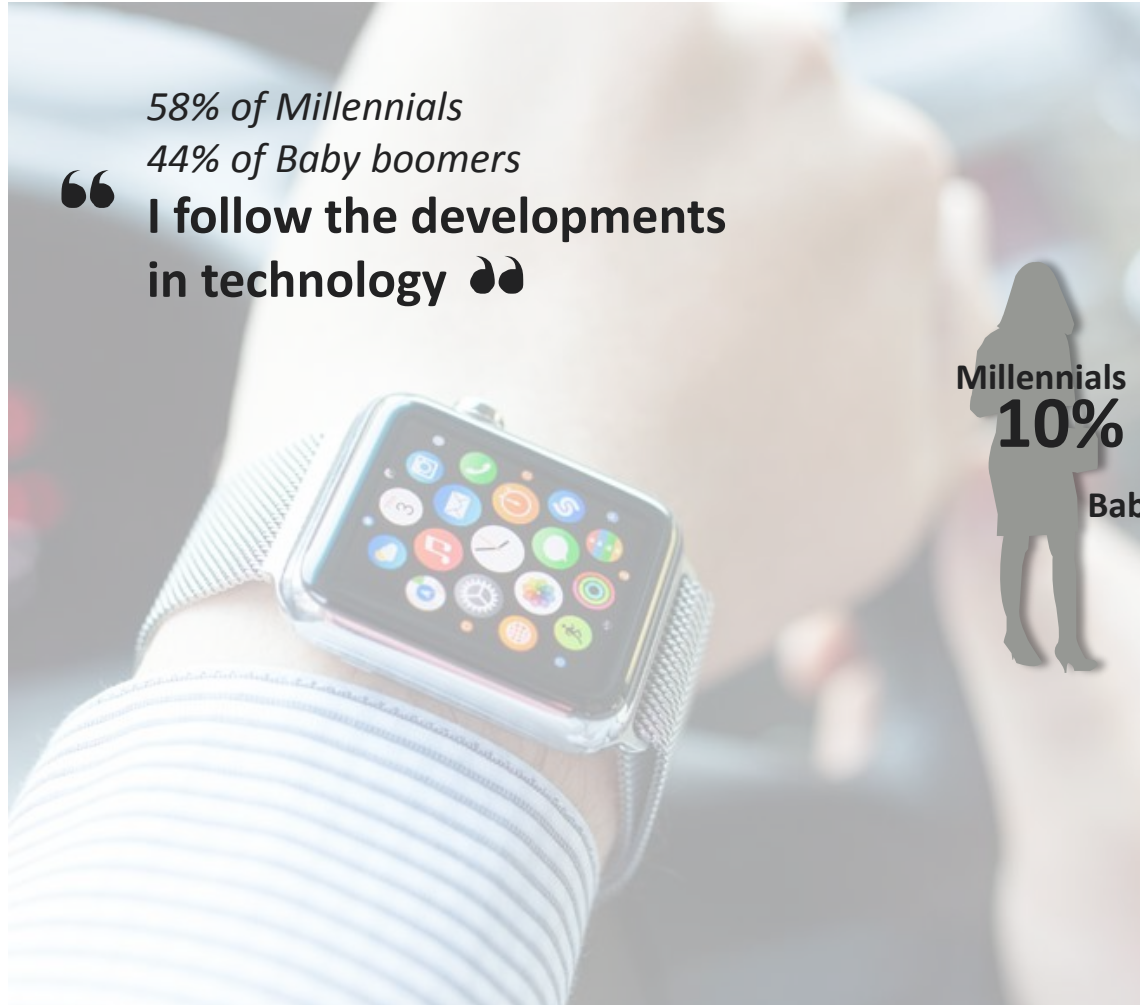
AFFLUENT: NOT AVERAGE

Wearable devices

58% of Millennials

44% of Baby boomers

“ I follow the developments in technology ”



Own wearable device

Millennials
10%

Baby boomers
2%

Uploaders
11%

Globe trotters
12%

Total Affluent
5%

AFFLUENT: NOT AVERAGE

Mobile used for product research

Use tablet or mobile regularly for: search for information on products/services

46% Millennials

46% Globe trotters

42% Uploaders

30% Baby boomers

38% Average Affluent

AFFLUENT: NOT AVERAGE

Online shopping for holidays

Amount spent on online purchases in last 6 months

Millennials



€1,901

Hotel reservations
Books
Holiday
Airline tickets
Cosmetics/Beauty

Baby boomers



€1,595

Hotel reservations
Books
Holiday
Airline tickets
Music

Uploaders



€2,179

Books
Hotel reservations
Holiday
Airline tickets
Cosmetics/Beauty

Globe trotters



€2,831

Hotel reservations
Airline tickets
Holiday
Books
Music

AFFLUENT: NOT AVERAGE

All groups take at least five holidays

5

Is the number of holidays Millennials and Baby boomers take in a year. Uploaders take 6 holidays per year. Globe trotters take 8.

AFFLUENT: NOT AVERAGE

Luxury on holiday is priority, even for Millennials

70% Millennials | 66% Baby boomers
| 67% Uploaders | 75% Globe trotters

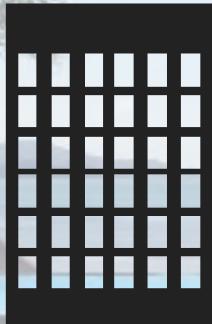
“ I do not mind paying for
extra quality ”

AFFLUENT: NOT AVERAGE

Luxury on holiday is priority, even for Millennials

have stayed in 4 + star hotel or upscale resort in past year:

★★★★



- 49%** Millennials
- 38%** Baby boomers
- 49%** Uploaders
- 68%** Globe trotters

AFFLUENT: NOT AVERAGE

In short



Millennials

Still love print



Uploaders

Social media opinion leaders,
the voice of the online crowd



Baby boomers

Technology is getting more
important role in their lives



Globe trotters

Heaviest International
Media consumers



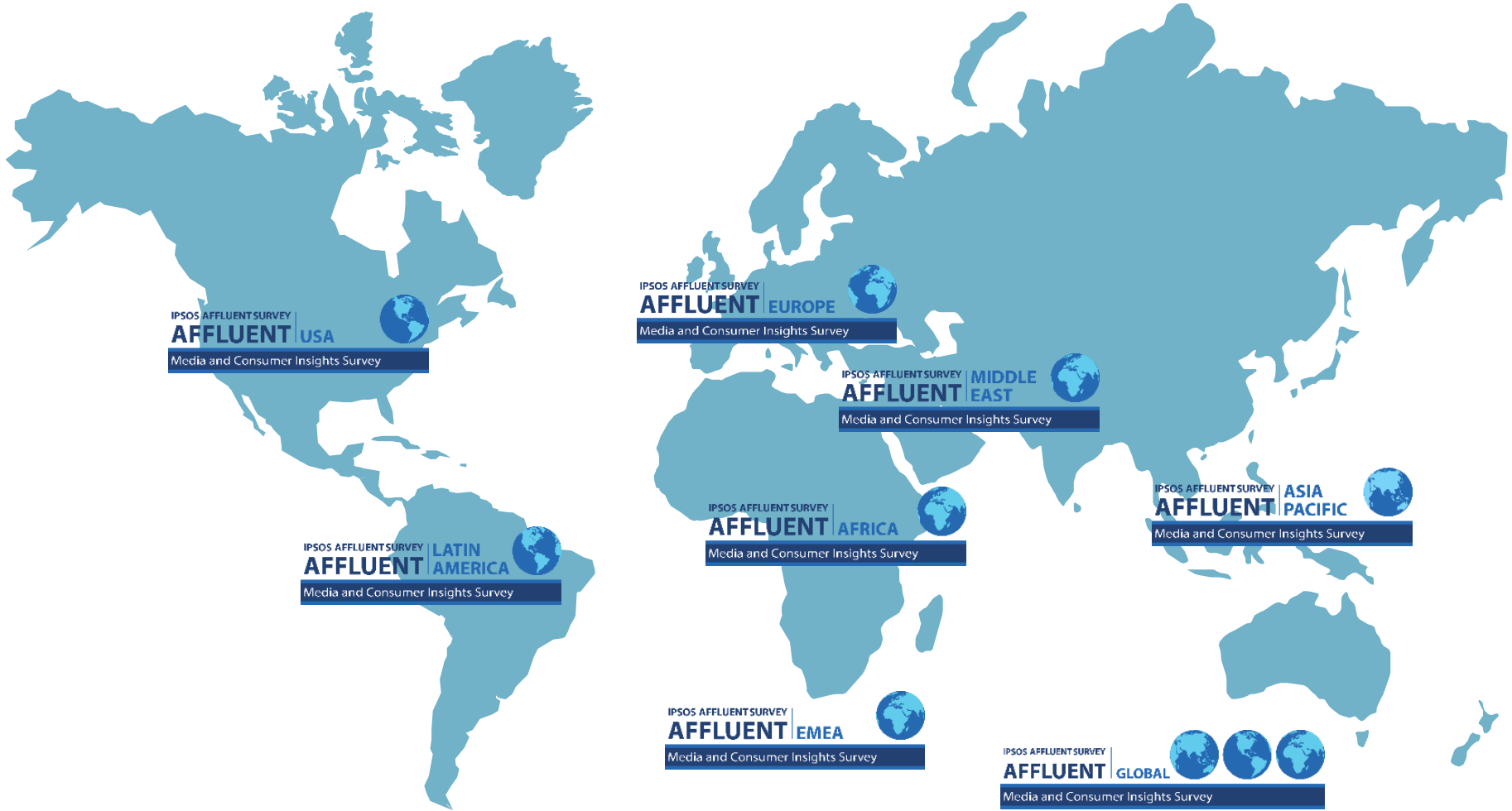
INTO THE FUTURE

GAME CHANGERS



INTO THE FUTURE

Other releases



INTO THE FUTURE

Ipsos Affluent Survey Europe 2016/2017



Making sense of fragmented media



Ask less questions, generate more answers



Become the experts in the affluent field

Brand Centric Streamlined Survey

On-going

Current topics

Quarterly

Luxury & Travel



Media Brand Engagement



The Media Day



The Digital World



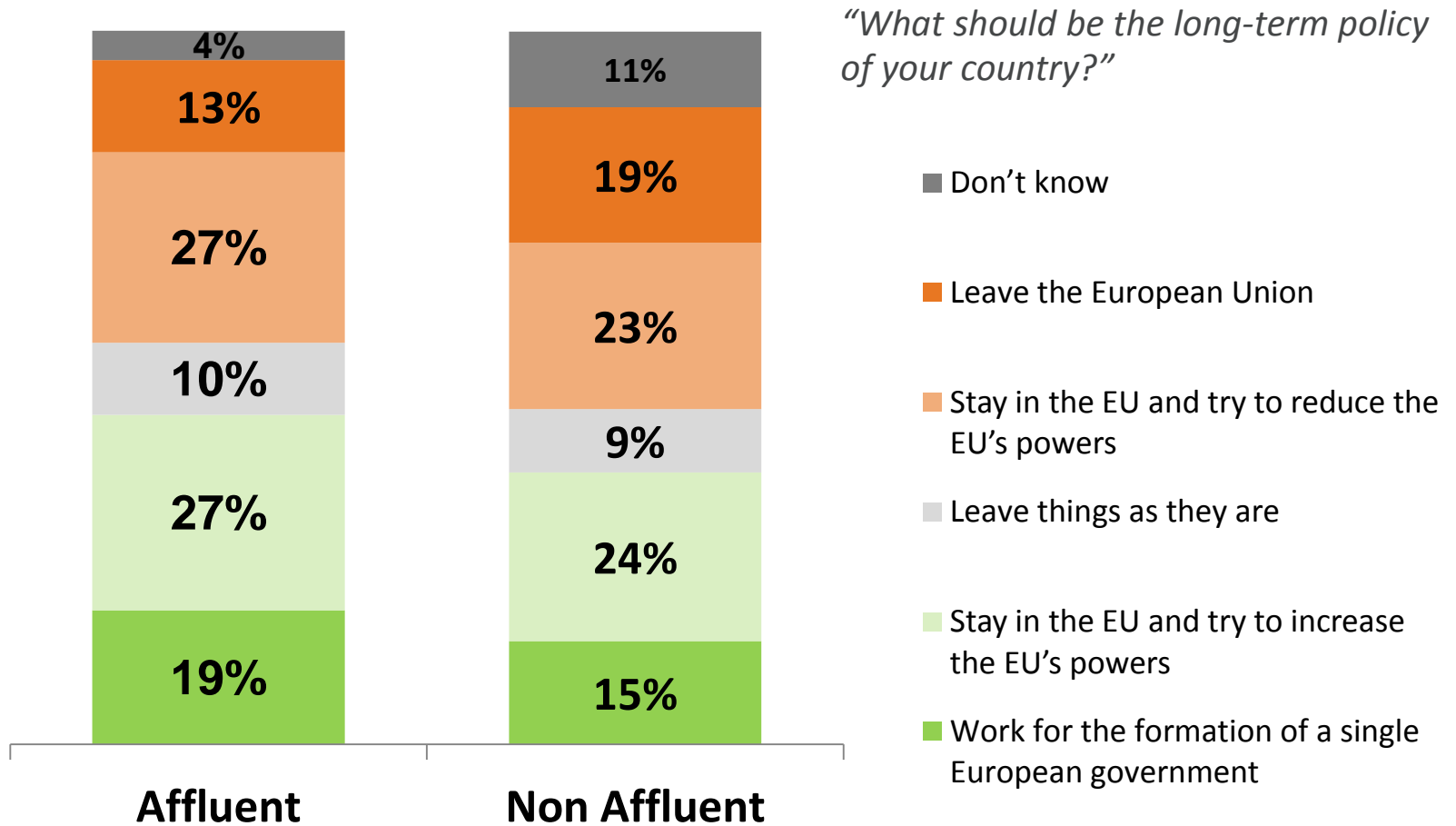


CURRENT TOPICS

The Affluents' view on Europe

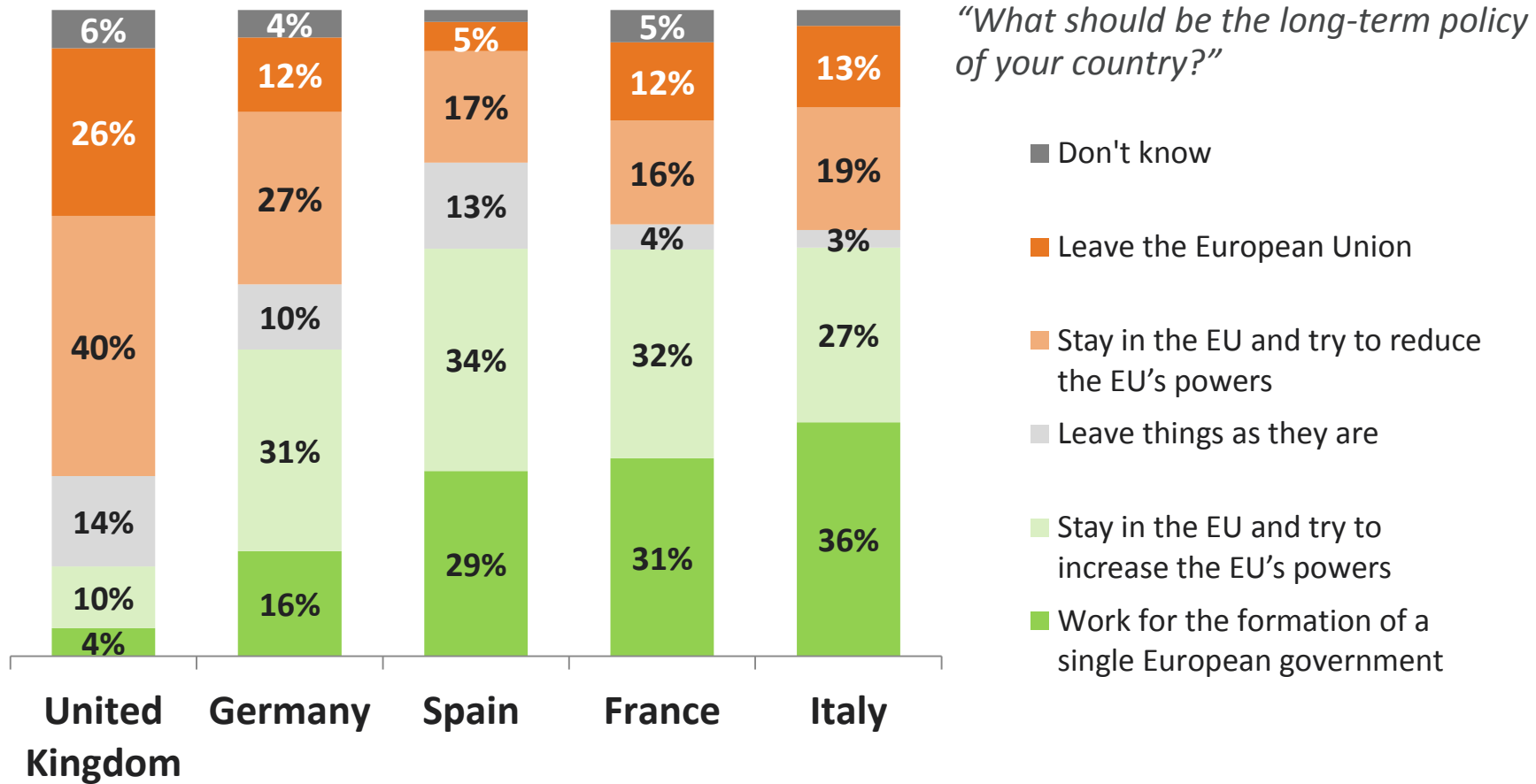
CURRENT TOPICS

Affluent more positive towards EU than Non Affluent



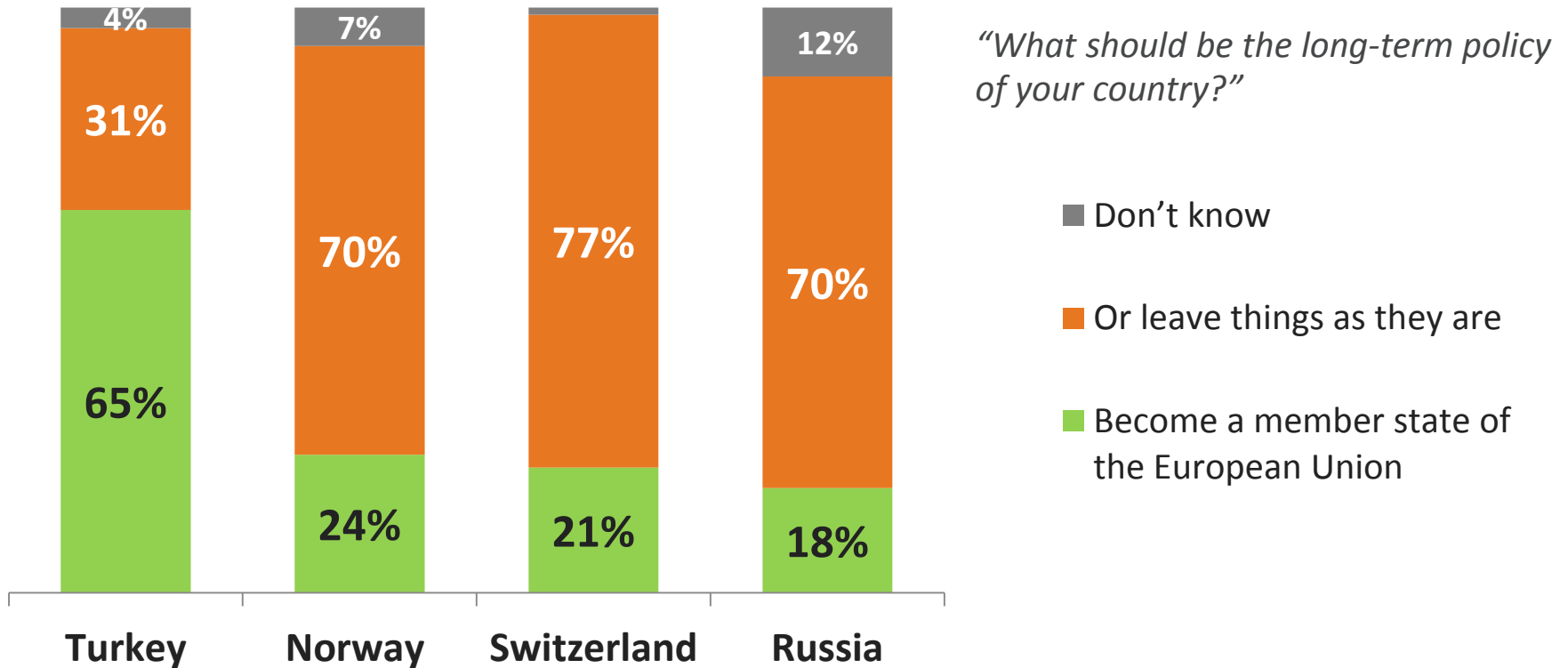
CURRENT TOPICS

British Affluent wants to reduce powers EU



Base: Affluent Europe 2016, EU countries only, in Nov15/Apr16

Turkish Affluent eager to join EU



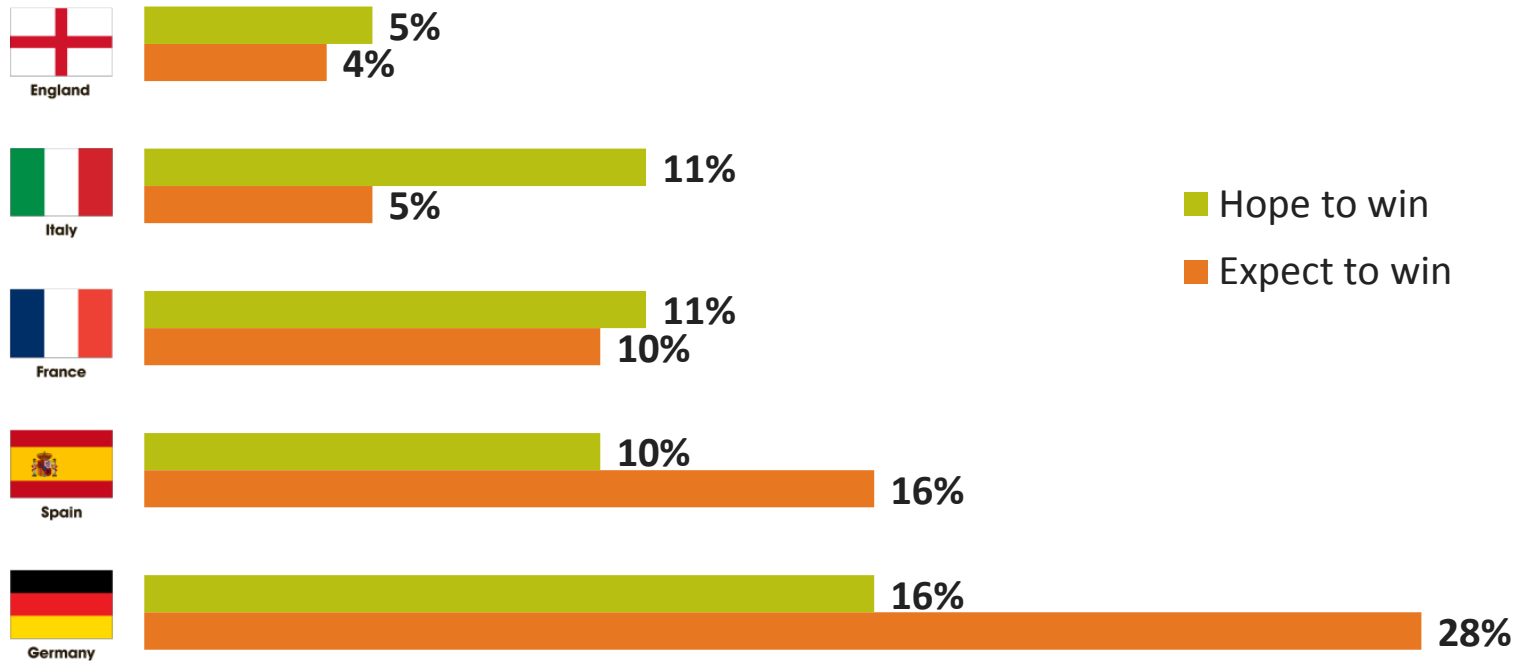


CURRENT TOPICS

Football

Affluent picks Germany as winner

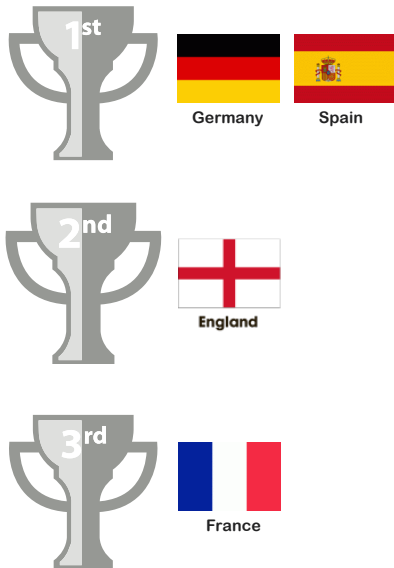
“Which country do you expect to win the European Football Championship? Which country do you hope will win?”



French Affluent optimistic about winning Euro 2016

“Which country do you expect to win the European Football Championship?”

British Affluent:



French Affluent:



Dutch Affluent:



NHK WORLD

FINANCIAL TIMES

The Economist

ZenithOptimedia

THE WALL STREET JOURNAL.

TIME



Discovery Channel Newsweek

Bloomberg Markets

Bloomberg Businessweek



Bloomberg

Lagardère

The New York Times Media Group

NATIONAL GEOGRAPHIC MAGAZINE



SKY NEWS

cedar

HAVAS MEDIA

publicitas

euronews.



Bloomberg TELEVISION



dentsu AEGIS network



DW Deutsche Welle

MEDIACOM People first, better results



HAKUHODO

Forbes



KR media linking people and business

BBC WORLD NEWS

NATIONAL GEOGRAPHIC CHANNEL

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