

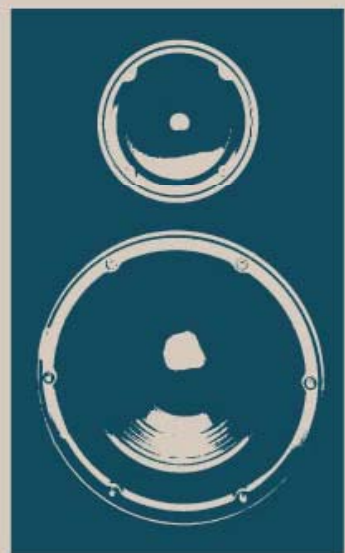
YOUNG ADULTS REVEALED CREDENTIALS

2008



synovate

Research reinvented



OnePointNine

from slightest tremor to seismic shift



- Young Adults Revealed has been put together by Synovate's new community OnePointNine.
- 1.9 is the lowest level of seismic activity discernible by human beings. OnePointNine brings the same degree of sensitivity to detecting, understanding and analysing global behaviours in specific life-stages.
- They are a passionate team of international researchers dedicated to picking up on the small things that will turn into the next big thing – not just fads but fundamental shifts in the markets.
- The OnePointNine team provides syndicated lifestage, lifestyle and trend studies like Young Adults Revealed as well as specific ad hoc research to explore these issues for your brand.
- Contact Julian.Rolfe@Synovate.com for further information
- OnePointNine 'from slightest tremor to seismic shift'

YOUNG ADULTS REVEALED 2008



Introduction and Background



- Synovate's Youth & Trends department has been running syndicated reports for seven years in the UK under the name Project Edge
 - They have covered a wide-range of topics and many industries including:
 - The media, fashion, music, finance, soft drinks, snacking, sport, grooming, technology, communications, the environment, alcohol and nightlife
- Several of our clients have expressed an interest in research that not only focuses on the UK, but also puts it in context of youth trends globally
 - Since Synovate has youth departments around the world, we are in a unique position to offer this
- In response to those demands, Synovate introduced a new syndicated youth offering in 2006
 - Set up to match the growing needs of clients to put research in a broader context, initially European but with a view to extend the coverage world-wide

Introduction and Background



- This study matched clients' needs by:
 - Providing genuinely pan-European research in key territories
 - Focusing on the 18-24 youth market
 - Identifying core similarities and essential differences in the different regions
 - Utilising up-to-date methodologies to provide deeper insight
- The study was very successful
 - Clients could purchase Individual Country Reports and / or the Pan-European Report
 - Clients included MTV, Adidas, Sony, Coca Cola, Heineken, Coors, P&G and BAT
 - It won 2 Synovate Wow Awards, an Aegis Award, and was nominated at the MRS Awards

What's Young Adults Revealed then?



- In 2008, Synovate is taking Young Adults Revealed to a truly global level
 - The research will be taking place in 26 countries worldwide
 - We are interviewing 12,400 respondents
 - It will be indispensable for any company trying to understand the attitudes and behaviour of 18-24s around the world, and market to them
 - The report will be available on a password-protected CD, which will also contain all the tables for clients to use as they wish

Where will it take place?



The markets we will cover:

- Europe
 - Italy
 - France
 - Germany
 - UK
 - Spain
 - Portugal
 - Greece
 - Norway
 - Sweden
 - Russia
 - Poland
 - Romania
 - Bulgaria
 - Turkey
- APAC
 - Japan
 - China
 - Australia
 - New Zealand
- MEA
 - Saudi Arabia
 - Egypt
 - South Africa
 - Morocco
- Americas
 - USA
 - Canada
 - Mexico
 - Brazil

What will it cover?



- The areas of focus have been expanded. There will be:
 - A ‘cool brand monitor’ to assess how your brand is perceived globally,
 - Followed by sections on:
 - Attitudes to the environment; Technology and communication; Media; Socialising, entertainment, hopes and fears; Grooming
- The reports will offer a valuable insight into youth lifestyles and opinions across the world and will enable clients to:
 - Gather attitudes to their brand, crucial topics and other relevant areas (e.g. the environment or corporate social responsibility) among this crucial, hard-to-reach segment
 - Understand what interests this target group and therefore how best to entice these consumers with offers and incentives
 - Improve their understanding of behaviour and emerging trends worldwide

How will it work?



There are three parts to the methodology:

1. An interview with an expert in young adults in each market:

- The experts are either journalists, cultural commentators or academics specialising in the field of young adults and leisure activities
- These interviews help us to understand the background, and ensure we don't miss any new trends

2. A quantitative study using Synovate's online panel:

- This enables us to make the research robust by sampling 12,400 respondents worldwide

Follow-up expert interviews:

- Conducted in each country with a different expert to the initial interview
- Validates and adds insight to our analysis

What format will the findings be in?



- Each Synovate office produces an in-depth report for their country (Individual Country Report), combining the findings from the expert interviews and online panel
- Each Individual Country Report will be fed in to produce the Global Report, which will outline similarities and difference in both attitude and behaviour among the world's 18-24s
- Fieldwork will start in March 2008
- The finished reports will be available from August 2008

How much will it cost?



- The reports can be bought in two ways:
 - Global Report - \$40,000
 - Individual Country Report – Price varies according to country (see next slide)
- There will be reductions for the following:
 - Pre-sale sweetener – 10% off any purchase
 - Bulk sales – If a client buys the Global Report, they will get a 10% reduction off any Individual Country Report
 - If a clients buys three Individual Country Reports, they will get the fourth for free

Individual Country Reports – cost by country



- UK - \$16,000
- Germany \$8,700
- France \$9,500 Italy \$7,100
- Spain \$12,300
- Iberia (Spain & Portugal) \$19,900
- Latam (Spain, Portugal, Brazil, Mexico) \$32,725
- Russia \$6,300
- Poland \$6,900
- Romania \$7,900
- Bulgaria \$4,000
- Turkey \$10,000
- Greece \$4,700

- Norway \$6,300
- Sweden \$7,900
- USA \$18,000
- Canada \$10,000
- Brazil \$16,000
- Mexico \$16,000
- Japan \$17,000
- China \$6,000
- Australia \$13,777
- New Zealand \$4,750
- Saudi Arabia \$14,500
- South Africa \$15,000
- Egypt \$9,436
- Morocco \$9,436

Key insights (last year's EU report)



- 58% of 18-24s across Europe agreed with the statement 'My friends are the most important thing in my life'. This means they regard friends as more important than education, career or family
- More regularly surf the net (74%) than watch TV (72%)
- They are more clean-living than previous generations – only 35% drink alcohol regularly (although more Brits do than any other country - 56%); only 22% go out 4 nights a week or more; and 50% have never smoked
- Smoking has certainly lost its bohemian image. Among smokers, 72% disagreed with the statement 'Smoking is cool'
- They can't really be bothered with exercise. 21% never do any sport at all. Only 24% go to the gym regularly – more males than females (28%:20%)
- It's a myth that young people are obsessed with their appearance and spend lots on toiletries – 25% spend less than £10 per month; a further 42% spend less than £25

Key insights (last year's EU report)



- It's also a myth that 18-24s rush out and buy new technology. 41% prefer to wait and see what other people make of it before they purchase
- Not everyone's blogging like crazy. Only 15% have a blog, while only 24% use social networking sites like MySpace
- Young people do not hear about most new music online or through friends. Most hear it on the radio (31%)
- However, more of their music collection is now downloaded (41%) than purchased in shops (33%)
- Not many listen to music on the mobile yet. Only 21% in fact
- Most don't go to gigs. 43% haven't been to one in the last 3 months, while a further 43% have been to one or two
- There has been a sea-change in attitudes to sponsorship at music events. Only 2% think it is a negative thing. 35% think it's positive because it means there are usually better bands and facilities

