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Synovate PAX delves into media consumption, psyche and lifestyle of the Gulf's movers and shakers

DUBAI - Synovate, a leading global market intelligence company, today released Middle East data from the Synovate PAX Media Survey for Q1 and Q2 2004.

The survey tracks ownership and buying intentions for a wide range of high-end products across the UAE and Saudi Arabia. In addition, media consumption, psychographics and lifestyles are examined in depth.

This information gives media organisations and marketers brand new insights into what's driving affluent residents of the Gulf at any particular time – ensuring they make savvy advertising and marketing decisions. Because PAX covers the top 20% of society, these consumers are of great importance – the movers and shakers with the most money to spend.

Some examples of these findings up to mid 2004 are:

PSYCHOGRAPHICS

Insights into attitudes towards media and brands

PAX respondents are asked about their attitudes to a range of statements, which are designed to pick up attitudes and beliefs about purchasing, advertising, brands and products.

Synovate Media Director Steve Garton said that Top Management in both Saudi Arabia and the UAE rate higher than average across most of the statements.

“Not surprisingly, Top Management in both countries overwhelmingly believe in having an international perspective and want to stay well informed. This highlights the importance of international and regional media to marketers and advertisers in the Gulf.”

“It seems PAX respondents in the Gulf enjoy shopping more than their counterparts in Asia Pacific – 80% percent of women and 70% of men get their kicks from shopping, compared to half of women and a third of men in Asia Pacific.”

Some statements examined were:

“It’s important to have an international perspective”

- Three quarters of Top Management in both countries share this view (76% in Saudi Arabia and 73% in UAE).

“I pride myself on being well informed”

- 83% of the PAX audience in the UAE consider themselves well informed, compared to 79% of their Saudi counterparts.
- However, Saudi Top Management ranked higher than their UAE counterparts (87% and 80% respectively).

“I prefer to be a leader of a group rather than a follower”

- Not surprisingly, three quarters of the region’s rich and wealthy want to lead rather than follow, but Saudi Top Management feel more strongly about this (83%) than their UAE counterparts (64%).

“I’m often one of the first to buy new products/ gadgets”

- 6 in10 Saudis are eager to improve their lifestyles and are clearly early product adopters, compared to 5 in10 of their UAE counterparts.

“Paying extra for quality is worthwhile”

- There are very high agreement levels with this statement: 9 in 10 Saudis and 7 in 10 UAE residents. This shows that PAX eligibles appreciate quality and are willing to invest in the best.

“I have greater trust in products I have seen advertised”

- Fully half the Saudi and UAE elites show trust in products they’ve seen advertised or buy them because of their ads.

“I prefer to buy well known brands”

- With agreement of 88% in the UAE and 83% in Saudi Arabia, PAX elites in the Gulf obviously appreciate the value of well established brands. The issue for marketers is to build the brand promise through advertising and to deliver with products that excel.

“Keeping up with modern technology is a key to my success”

- There is high overall agreement amongst all regarding the importance of technology. Saudi Top Management score higher than those in the UAE (81% and 70% respectively).

“A home with most modern appliances is important to me”

- 8 in 10 PAX eligibles in both countries like to stock up on the latest items, highlighting huge opportunities for marketers in the Gulf region.

“Well known foreign brands are usually better quality”

- 8 in 10 respondents hold this view in the UAE, compared to 6 in 10 respondents in KSA, indicating that Saudis also trust homegrown brands.

“I enjoy the fun of shopping”

- 77% of PAX elites in the UAE get their kicks from shopping (80% amongst TM), compared to 71% of the Saudi upper class (68% TM).
- While 80% of female respondents (87% in the UAE and 76% in Saudi Arabia) agree with this statement, men were a little less keen: 70% consider shopping to be fun (72% in the UAE and 69% in Saudi Arabia).

“I prefer to buy designer goods/ brands”

- People in the UAE are more likely to have this view (72%), compared to wealthy Saudis who don't seem to place as much emphasis on designer goods (44%).

“Adverts are a good way to learn about new products and services”

- Well over three quarters of the wealthy class (80% in the UAE and 78% in KSA) agree that advertising helps them and keeps them informed of new products. The PAX elites appear to be a receptive audience for advertisers.

“I sometimes like to treat myself to something special, even if it is expensive”

- Residents in the UAE admit to being more indulgent, scoring around 78% (75% for TM). Elites in Saudi Arabia were less likely to treat themselves, scoring 68% (60% for TM).

“I will buy a new product or service if it makes life more enjoyable”

- 80% of PAX eligible elites agree with this statement, with UAE Top Management heading the list of hedonists (86%), compared to 78% of their Saudi counterparts.

“I'm prepared to consider buying new brands”

- A high percentage of the well-off in both the UAE and Saudi Arabia appear to be easily tempted by new brands (71% and 69% respectively), indicating opportunities for new advertisers and marketers..

LIFESTYLE

How the Gulf's elite relax and play

A series of questions were posed to respondents to gauge how they spend their leisure time. A selection of findings appears below:

- In Saudi Arabia soccer is by far the most popular sport, with 68% interested in the sport.
- In the UAE cricket is most popular, with a 48% interest amongst PAX eligibles – thanks to the large number of South Asian expatriates amongst these respondents. Soccer is second most popular.
- Half the elites in the UAE mentioned that their favourite activity during the past 6 months was going to the cinema, while one quarter preferred visiting art galleries.
- On the other hand, respondents in Saudi Arabia mostly visited historical sites during the past 6 months, followed closely by going to traditional Janadriyah (dances), as well as visits to museums and art galleries.
- Half of the well-off UAE residents are club members, and 2 in 10 are members of sports, fitness or social clubs.

PURCHASE INTENTION - NEXT 12 MONTHS

What's on the shopping lists of the Gulf's movers and shakers?

Overall, the results show strong purchase intentions across luxury items and technology, indicating a buoyant year ahead for these items.

The highlights of the results through Q2 2004 are:

- An overall 36% of respondents said they intend to buy a new car - 23% in the UAE and 44% in Saudi Arabia.
- 14% intend to buy a new mobile phone with internet access, while 6% intend to buy a new one without internet access.
- 12% intend to buy a desktop computer (7% in UAE and 15% in KSA respectively), while 21% intend to buy a laptop/notebook computer (13% in UAE and 26% in KSA respectively) in the coming 12 months.
- 21% (15% UAE and 24% KSA) intend to buy flat screen TVs, and 17% intend to purchase a LCD/Plasma TV (15% UAE and 18% KSA).
- 24% said that they intend to buy a digital video camera in the next 12 months, while 11% are keen on buying a digital still camera during that period.

Please note

The information in this Fact Sheet comes from a base of 2,203 residents in Abu Dhabi, Dubai, Sharjah (UAE) and Riyadh, Jeddah/Mecca, Dammam/Khobar (KSA).

What is Synovate PAX?

The Synovate PAX survey tracks media, prosperity and influence in the UAE and Saudi Arabia.

Synovate speaks with affluent consumers every day of the year to get the answers to questions such as:

- What do business decision makers read and watch?
- How have regional and world events affected media consumption?
- Which products have been embraced by innovators and early adopters?



This critical information helps media organisations, agencies and marketers to understand what the Gulf's most influential consumers are reading, watching, using and buying. It is information that is central to continued success in the UAE and Saudi markets.

The PAX survey covers the following segments:

- 1) Affluent adults aged 25 to 64 living in homes which enjoy a monthly household income of 12,000 AED or above in the UAE, and 10,000 SR or above in Saudi Arabia. They also have a minimum monthly personal income of 10,500 AED in the UAE, and 8,500 SR in Saudi Arabia.
- 2) Business Decision Makers: Executives working in companies with 10 or more staff who are responsible for a function or department. They must earn a monthly personal income over 10,500 AED in the UAE, and 8,500 SR in Saudi Arabia.
- 3) Top Management: The most senior executives in companies with 10 or more staff. These leaders of commerce have titles such as Chairman, President, CEO, COO, CFO, Director or General Manager.

The inaugural PAX Middle East survey was conducted in the UAE and Saudi Arabia during the first 6 months of 2004 with a total sample size of 2,203 using face-to-face interviews (this figure includes a Top Management sample of 600). Interviews with a further 2,200 respondents will be completed by year's end. The combined results will be available by March 2005.

Synovate PAX also covers eleven markets across the Asia Pacific region - Singapore, Hong Kong, Korea, Malaysia, Thailand, Indonesia, Philippines, Taiwan, India, Australia and Japan.