



sky NEWS HD

EMS+CEMS 2014

What Is EMS?

- With a sample of 28,076 and a universe of 50,680,000 EMS provides robust insight into the media, business and consumer lives of the most upscale and influential European community.
- EMS Respondents all fall into the following category:
 - Main income earners in the top 20% of households defined by household income; They are the top 13% of all adults within the 21-74 year age group
- EMS provides coverage across 21 key markets, including 4 within Central Europe (CEMS)



- EMS is conducted by Ipsos which also conducts EMS ME (Middle East), EMS Africa & PAX (Pan Asian X Media Study). Ipsos is working towards aligning these databases to allow for more consistent cross regional planning.

EMS Subscribers?

The European Media and Marketing Survey is the No1 planning and buying currency for Pan European media.

EMS continues to develop its subscription base – Most key agencies and media owners operating at an international level purchase the survey, cementing it's importance within the industry.

This support ensures EMS retains transparency and relevance; strong media owner support also keeps the survey unbiased.

Agency/Other Sponsors

Aegis Media	Dentsu
Hakuhodo	Initiative Media Dubai
Initiative Media UK	Kinetic
MediaCom	MediaEdge; CIA
Mindshare	MPG London
OMD	PHD
Publicitas	Universal McCann Dubai
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Meeting The EMS Income Criteria

- EMS represents main income earners in the top 20% of households (defined by household income).
- The income level to qualify for the top 20% varies by country.
- Individuals are eligible if they contribute at least 40% of total HHI.
- When two persons within a household qualify, the respondent is randomly selected. A household is defined as a group living together as family or partners. Where a individuals share accommodation but not as family, each individual is treated as a separate single person 'household' and is potentially eligible for the survey.

Table 3.1: Top 20% household income thresholds by country

Country	Currency	Year Income Rounded	Monthly Income rounded	Euro**** equivalent
Austria**	EUR	41,000	3,150	3,150
Belgium	EUR	49,500	3,850	3,850
Denmark*	DKK	685,000	57,000	7,650
Finland	EUR	62,000	4,850	4,850
France	EUR	45,000	3,500	3,500
Germany **	EUR	41,500	3,250	3,250
Ireland	EUR	61,000	4,750	4,750
Italy	EUR	32,500	2,550	2,550
Luxembourg	EUR	76,000	5,900	5,900
Netherlands	EUR	53,500	4,200	4,200
Norway	NOK	950,000	74,000	9,900
Portugal	EUR	23,500	1,830	1,830
Spain	EUR	30,700	2,400	2,400
Sweden	SEK	610,000	47,500	5,450
Switzerland	CHF	122,000	9,500	7,730
Turkey *****	TL	51,000	4,000	1,600
UK*	GBP	46,500	3,850	4,500
Czech Republic	CZK	410,000	32,000	1,230
Hungary	HUF	2,700,000	210,000	715
Poland**	PLN	45,000	3,500	810
Russia***	RUB	615,000	48,000	1,125

(*) : 12 months in a year-12.8 months a year for all other countries

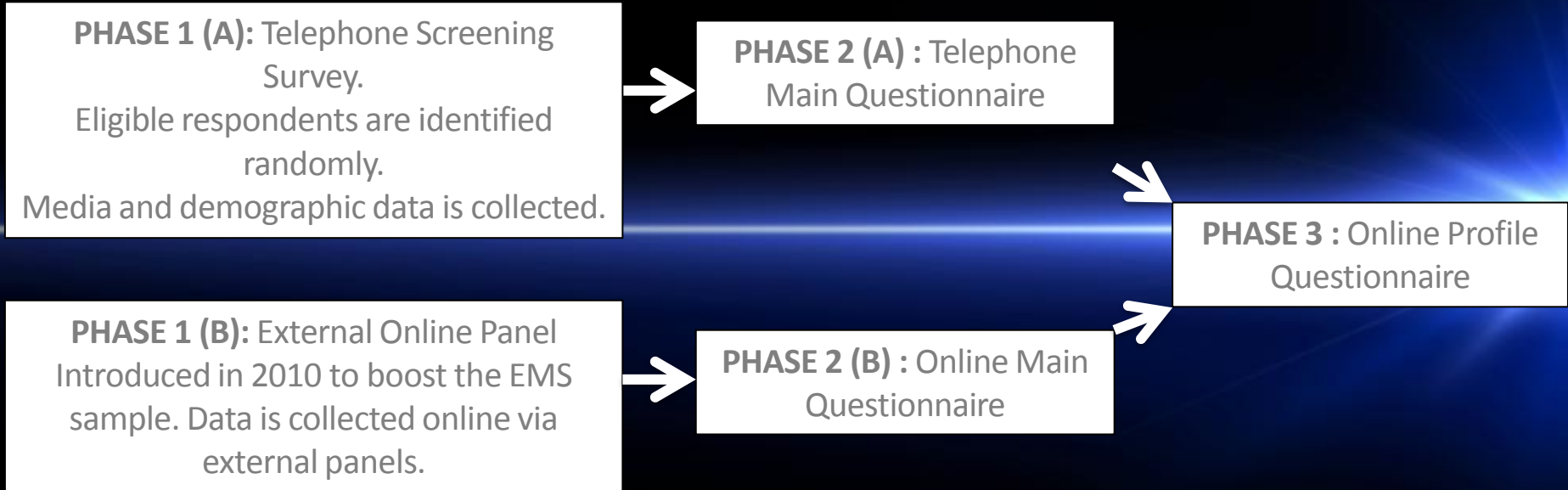
(**): Net incomes

(***): Top 20% threshold is the threshold for Moscow + St. Petersburg

(****): Source: oanda.com, 1 July 2013

(*****): Top 20% threshold is the threshold for Ankara, Istanbul and Izmir.

EMS Methodology



EMS Select

Reminder: EMS Regular sample includes main income earners in the Top 20% of households based on HHI, or 13% of all adults

So Why Was There A Need For EMS Select?

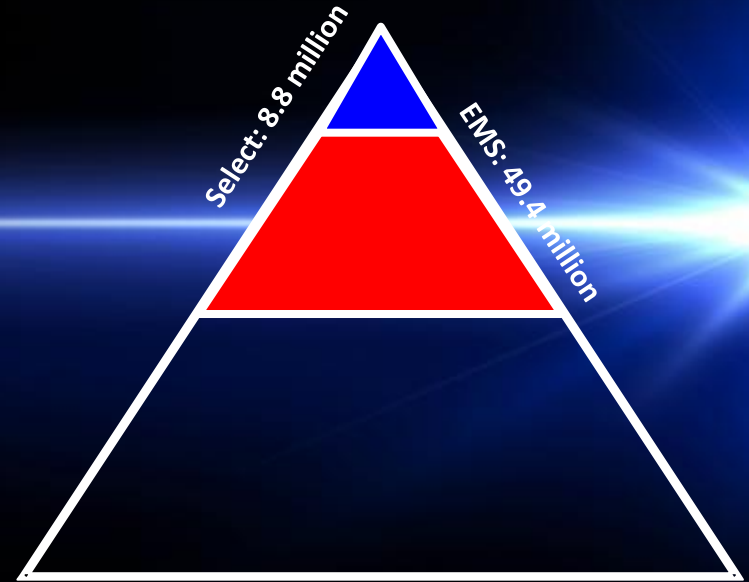
EMS Select provides measurement of an even more elite segment within the EMS survey; it is more suited to campaigns aimed at very upscale/senior individuals.

What is EMS Select?

EMS Select is a boosted sample (identified using lists) within the database to measure Top 3% in Europe.

Who does EMS Select include?

1. Top Managers - Senior managers at establishments with 10+ employees AND Responsible for 1+ employees AND Personal income of €40k+
2. Frequent Flyers - 6+ international business air trips
3. High Income Earners - Personal income of €80k



The logo for Sky News HD is centered on a dark blue background. It consists of the word "sky" in a lowercase, bold, black sans-serif font on a white rectangular background. To its right is the word "NEWS" in a bold, black sans-serif font on a red rectangular background. To the right of "NEWS" is the letters "HD" in a bold, black sans-serif font on a white rectangular background. A bright blue light flare with multiple rays emanates from the right side of the logo, extending towards the right edge of the frame.

sky NEWS HD

Viewer Snapshot

Sky News Viewers At A Glance

On average they earn a personal income of **€59,218**

23% are business decision makers. They are **40% more likely** than the average respondent to be an Influential Opinion Leader (4+ influential activities in the last year).

63% own personal investments.

Average age - **47**

63% Male : **37%** Female

60% are educated to degree standard or higher

26% of viewers fall within the top 3% of the EMS universe (EMS Select)

41% took 3+ return air trips in the last year.
21% took 3+ business air trips.
28% took 3+ leisure air trips.

They are **60%** more likely than the average EMS respondent to be a Department Head or above.
On average they work **44 hours** per week and have responsibility for **13 employees**.

98% are citizens of the country they reside in.
32% have lived/worked/been educated abroad

On average there are **3.0** people living in their household.

61% own 2 or more cars in their household

Opinions Of The Sky News Viewer

Average Index = 100



Leading The Field






















News never stops. Viewers need to be kept up to date each and every day, not once a week or once a month. That is why Daily Reach is the most critical measure of a news channel's audience delivery.

More viewers tune into Sky News every single day as their primary source of news than any other news and business competitor.

Daily Reach 000s



Sky News Reach By Market

 <p>Austria (969,000) Daily : 27,000 (2.8%) Weekly: 94,000 (9.7%) Monthly: 178,000 (18.4%)</p>	 <p>Belgium (1,221,000) Daily : 6,000 (0.9%) Weekly: 32,000 (2.6%) Monthly: 81,000 (6.6%)</p>	 <p>Denmark (774,000) Daily : 11,000 (1.4%) Weekly: 54,000 (7.0%) Monthly: 110,000 (14.2%)</p>	 <p>Finland (728,000) Daily : 11,000 (1.5%) Weekly: 44,000 (7.0%) Monthly: 83,000 (11.4%)</p>	
 <p>France (6,893,000) Daily : 44,000 (0.6%) Weekly: 186,000 (2.7%) Monthly: 432,000 6.3%</p>	 <p>Germany (10,045,000) Daily : 261,000 (2.6%) Weekly: 985,000 (9.8%) Monthly: 1,674,000 (12.7%)</p>	 <p>Ireland (338,000) Daily : 94,000 (27.7%) Weekly: 213,000 (62.9%) Monthly: 300,000 (88.9%)</p>	 <p>Italy (5,433,000) Daily : 766,000 (14.1%) Weekly: 1,792,000 (33.0%) Monthly: 2,496,000 (45.9%)</p>	
 <p>Luxembourg (52,000) Daily : 3,000 (5.2%) Weekly: 11,000 (21.5%) Monthly: 19,000 (37.1%)</p>	 <p>Neth (1,773,000) Daily : 41,000 (2.3%) Weekly: 144,000 (8.1%) Monthly: 274,000 (15.4%)</p>	 <p>Norway (620,000) Daily : 17,000 (2.8%) Weekly: 76,000 (12.3%) Monthly: 169,000 (27.2%)</p>	 <p>Portugal (846,000) Daily : 60,000 (7.1%) Weekly: 239,000 (28.3%) Monthly: 395,000 (46.7%)</p>	
 <p>Spain (3,793,000) Daily : 44,000 (1.2%) Weekly: 195,000 (5.1%) Monthly: 374,000 (9.9%)</p>	 <p>Sweden (1,343,000) Daily : 16,000 (1.2%) Weekly: 88,000 (6.6%) Monthly: 203,000 (15.1%)</p>	 <p>Switzerland (923,000) Daily : 16,000 (1.7%) Weekly: 59,000 (6.4%) Monthly: 97,000 (10.5%)</p>	 <p>Turkey (1,661,000) Daily : 53,000 (3.2%) Weekly: 218,000 (13.1%) Monthly: 381,000 (23.0%)</p>	 <p>UK (6,847,000) Daily : 1,380,000 (20.2%) Weekly: 3,335,000 (48.7%) Monthly: 4,929,000 (72.0%)</p>
 <p>Czech Repub (1,007,000) Daily : 8,000 (0.8%) Weekly: 40,000 (3.9%) Monthly: 95,000(9.4%)</p>	 <p>Hungary (820,000) Daily : 8,000 (0.9%) Weekly: 46,000 (5.7%) Monthly: 99,000 (12.1%)</p>	 <p>Poland (3,282,000) Daily : 74,000 (2.3%) Weekly: 337,000 (10.3%) Monthly: 691,000 (21.0%)</p>	 <p>Russia (1,312,000) Daily : 14,000 (1.0%) Weekly: 66,000 (5.1%) Monthly: 133,000 (10.1%)</p>	



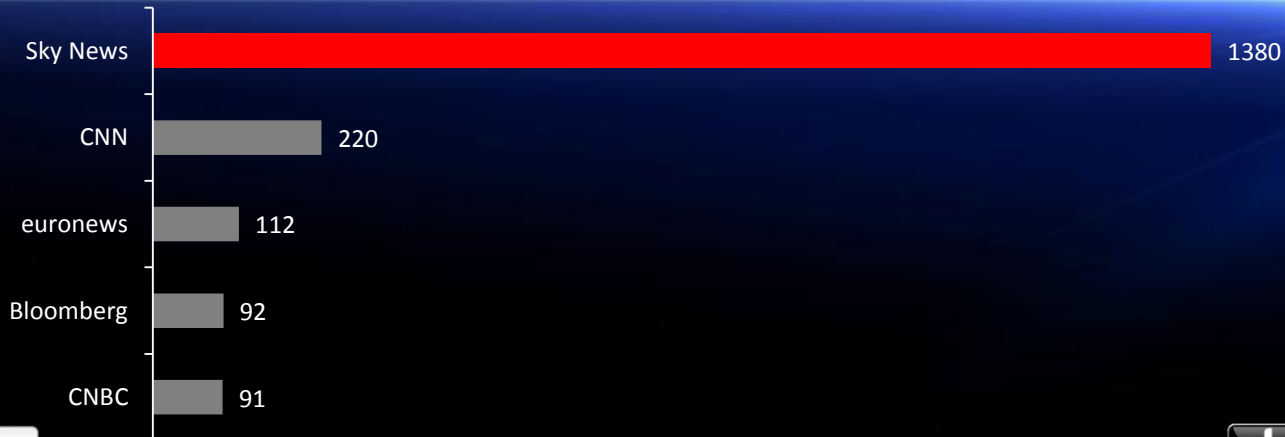
Competitive Reach

Unrivalled Reach In the UK

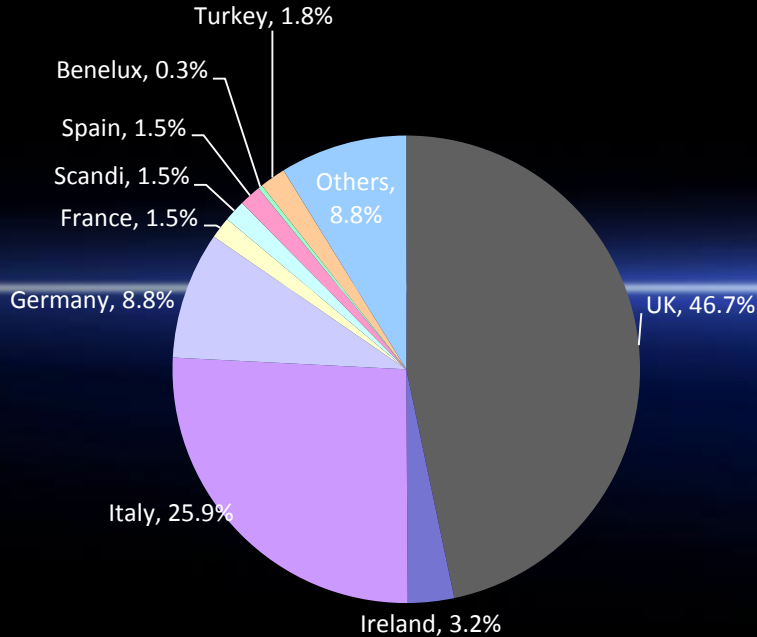
Sky News daily UK reach is **627%** higher than that of CNN

Sky News reaches **20%** of all UK respondents on a daily basis – significantly more than any other PE news or business channels

Daily Reach 000s



Sky News Beyond The UK



Sky News reaches **1,380,000** daily UK viewers.
BUT.....
It is also viewed on a daily basis by **1,574,000** viewers outside of the UK, which is **53.3%** of Sky News Pan European reach

Strong Reach Beyond The UK

Despite its reputation as a UK news channel, beyond the UK and Ireland, Sky News delivers Pan European reach which is **38%** higher than that of BBC World.

Daily Reach (000) – Total EMS Ex UK/Ireland



Sky News Offers Unique Reach

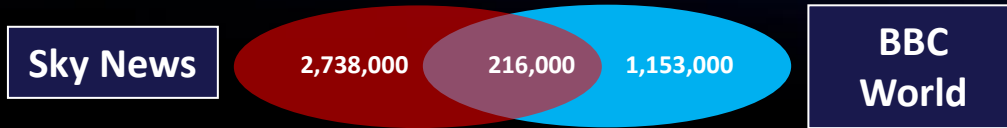
Total Sky News Daily Reach = 2,954,000

Total CNN Daily Reach = 1,763,000

Total BBC W Daily Reach = 1,369,000



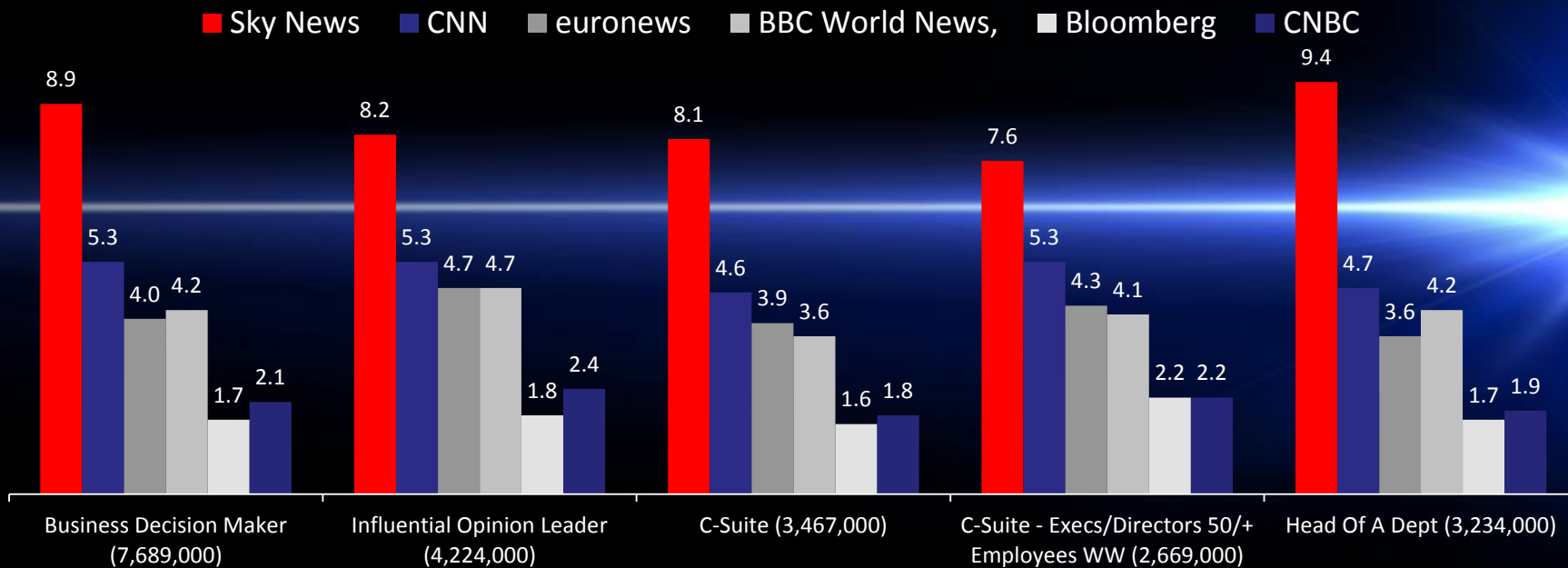
13% of CNN viewers watch SNI but only 7.5% of SNI viewers watch CNN



16% of BBC World News viewers watch SNI but only 7% of SNI viewers watch BBC World

Reaching An Elite Business Audience

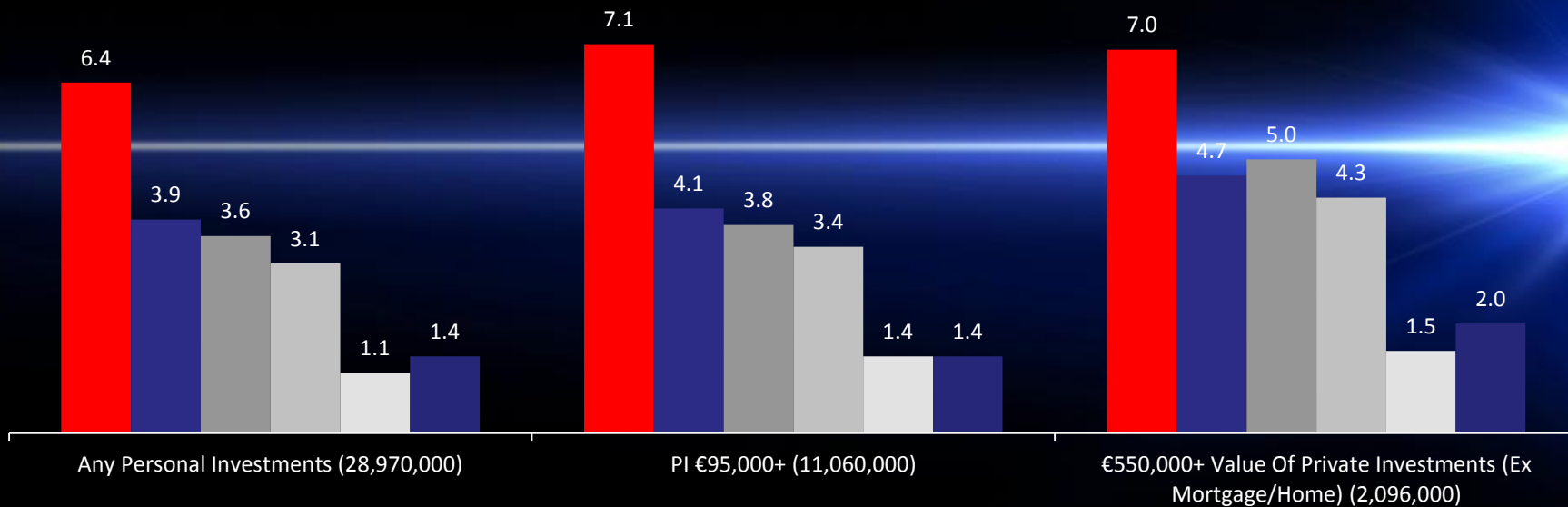
Daily Reach %



Reaching The Upscale Consumer

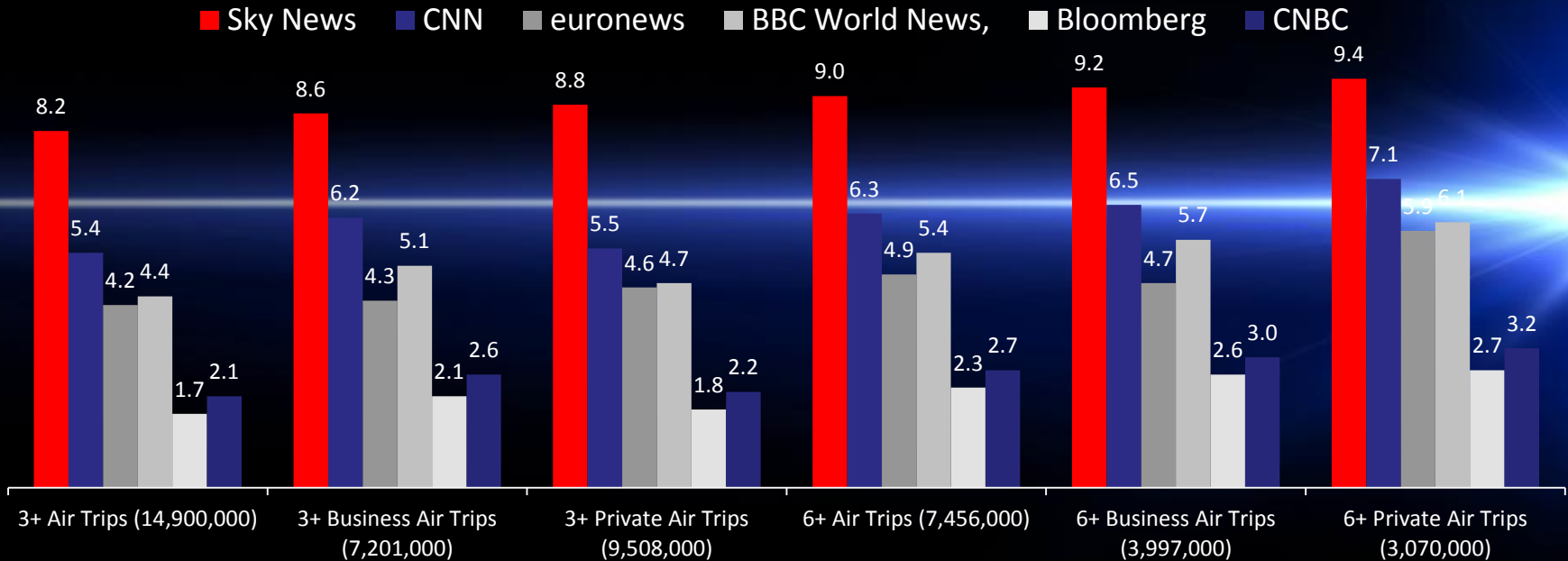
Daily Reach %

■ Sky News ■ CNN ■ euronews ■ BBC World News, ■ Bloomberg ■ CNBC



Reaching The Frequent Traveller

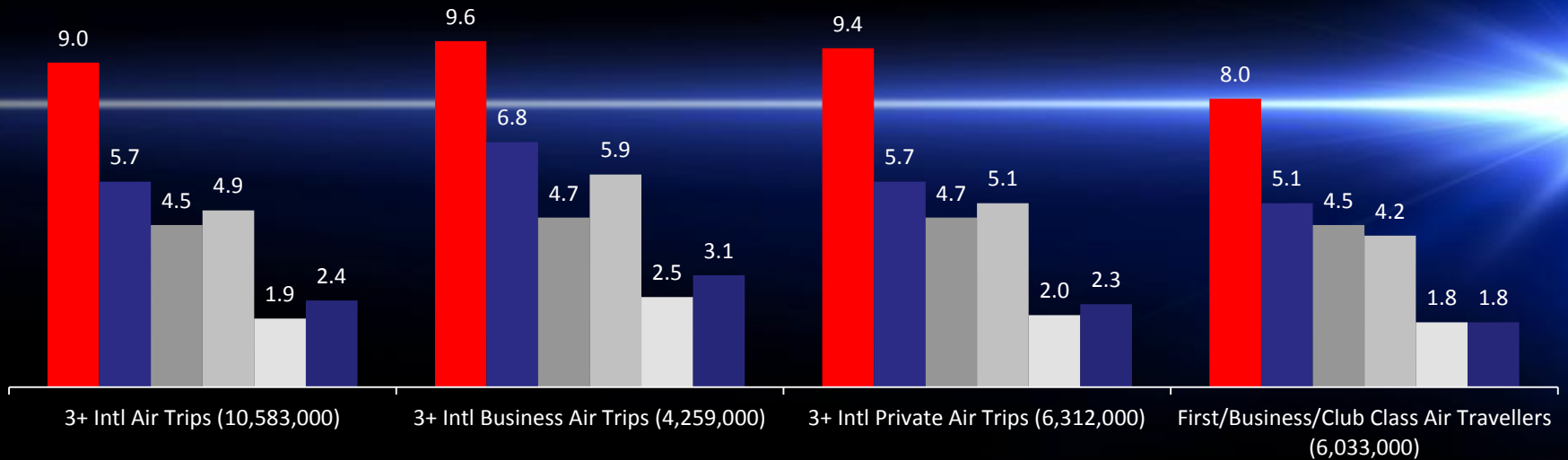
Daily Reach %



Reaching The International Traveller

Daily Reach %

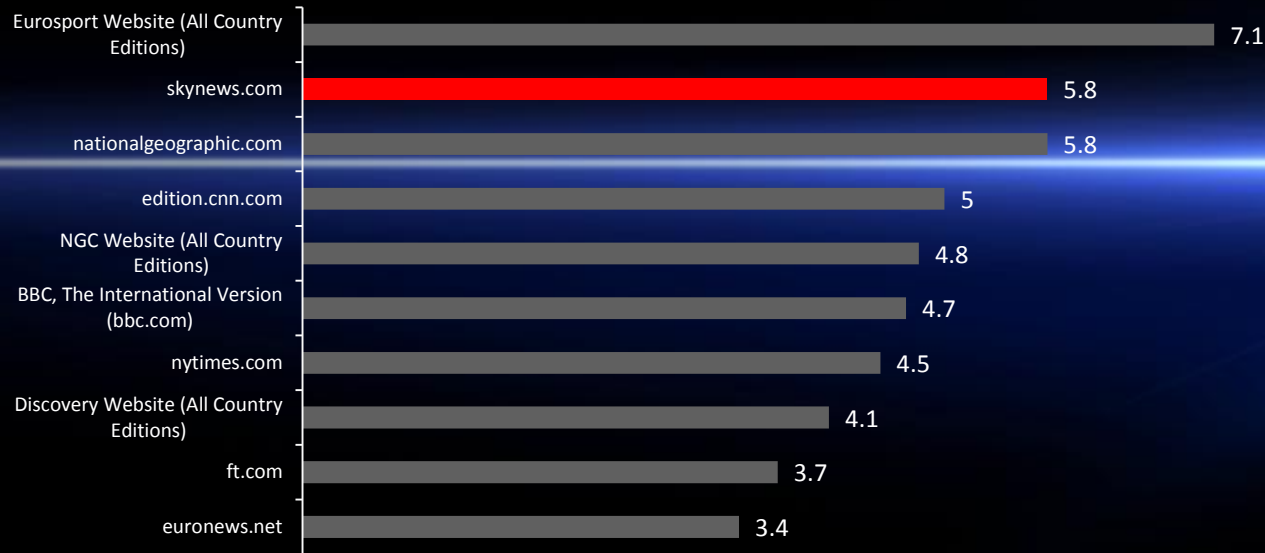
■ Sky News ■ CNN ■ euronews ■ BBC World News, ■ Bloomberg ■ CNBC



Sky News Website Reach

Every week the Sky News website attracts more visitors than most other International News websites

Weekly reach % (Top 10)

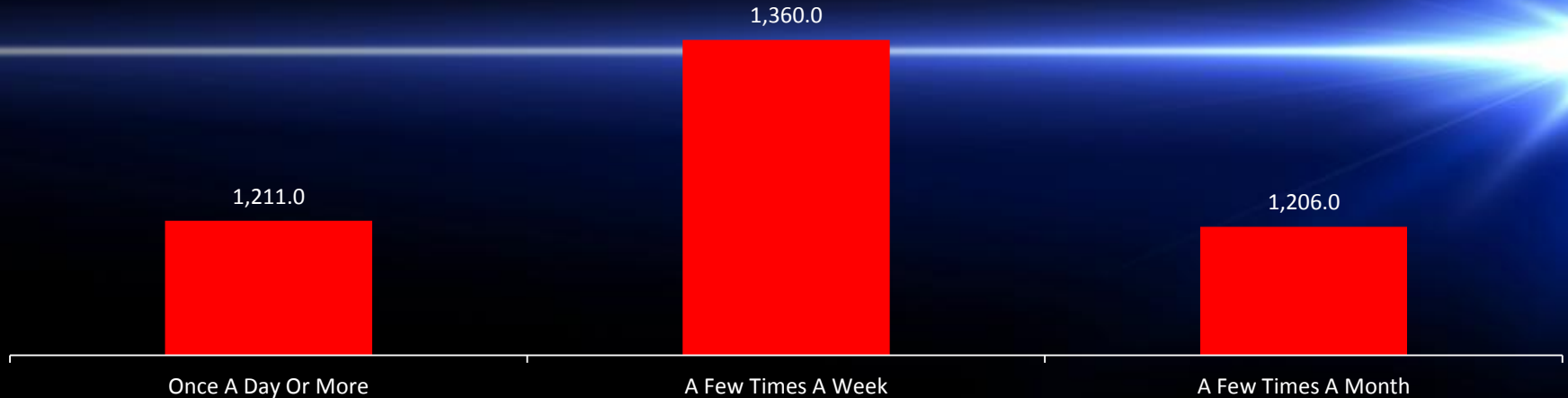


Frequency Of Visiting skynews.com

The Sky News website reaches **6,128,000** upscale Europeans on a monthly basis

More than a **Million** visitors are returning on a daily basis

Almost a **quarter** visit a few times a week or more



Daypart EMS Reach

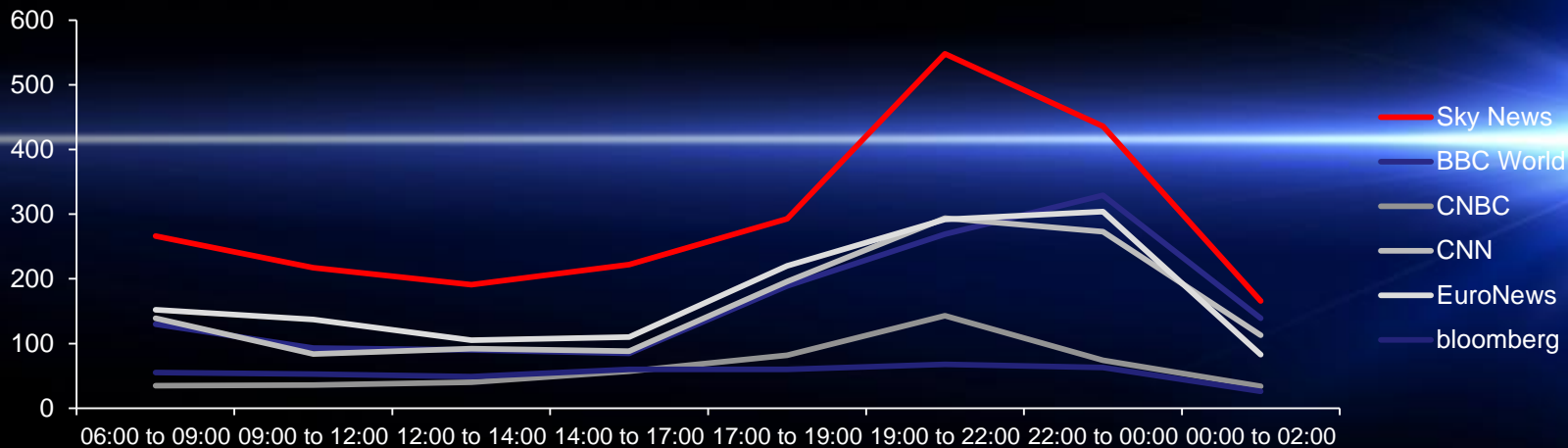
This information is covered during the telephone questionnaire

- TV Respondents are asked during which time periods yesterday they watched each channel for at least 2 minutes.
- They are then asked:
 - When did you start watching this channel?
 - When did you stop watching this channel?
 - Did you watch continuously during this period?
 - Were there any other periods in this day part when you were watching?
- Interviewers then code this into 9 day parts

Leading Reach Across The Day

Sky News achieves consistently strong reach throughout the day; across all day parts Sky News reaches more upscale Europeans than its core competitors

Average Reach Mon-Sun (000)

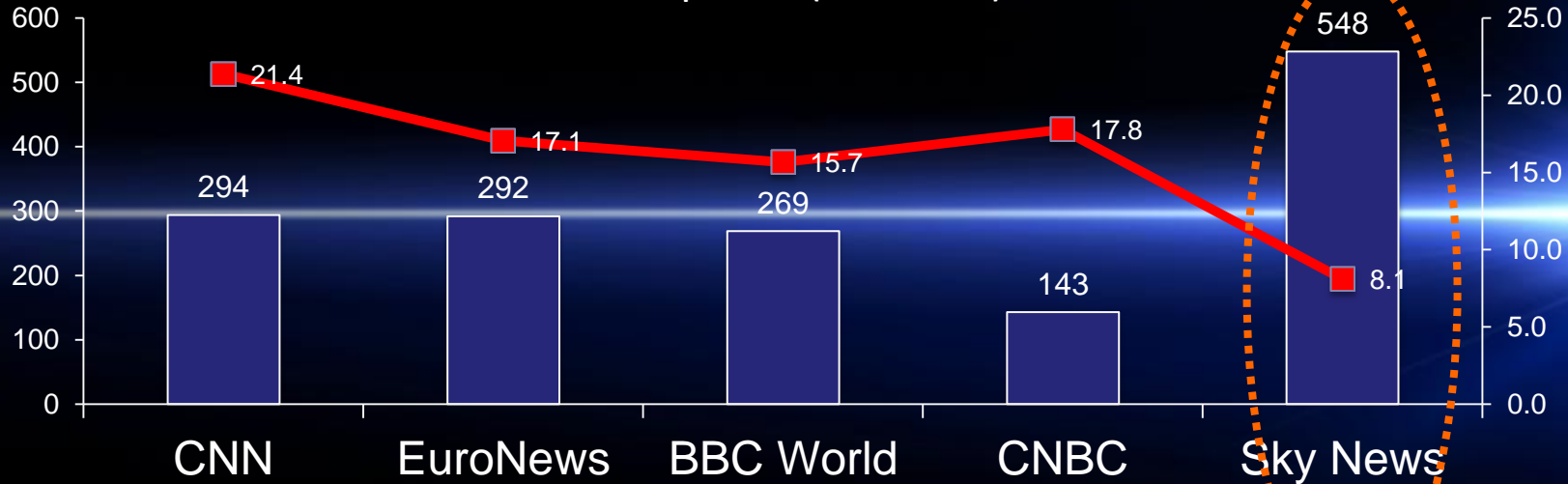


EMS Ratings: Day parts viewed by channel yesterday per quarter hour

Sky News Offers Cost Efficiency

Sky News delivers stronger peaktime reach at a more cost efficient ratecard than its main competitors

Based on M-S peaktime (1900 – 2200h)



Rate \$US

6,286

4,984

4,214

2,543

4,439

Source: EMS+CEMS Full Release 2014– All respondents base: 50,680,000, Daily Sky News viewers: 2,954,000

Rates: SNI 2013. Other channels estimated based on 2012/2011 rates

Adding Value To A Schedule

BUDGET: \$1,000,000 – Assuming equal budget split across channels

- Scenario 1 – 200 spots

- CNN: 81 spots 19.00-00.00 Mon to Sun
- BBC World: 119 spots 19.00-00.00 Mon to Sun

- Scenario 2 – 202 spots

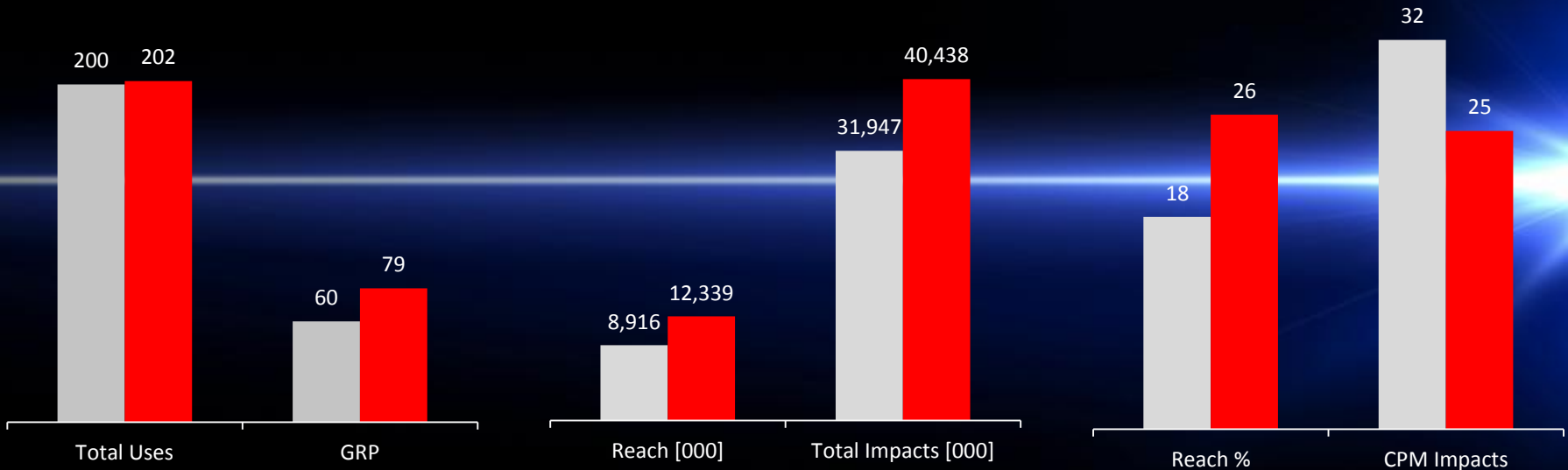
- CNN: 53 spots 19.00-00.00 Mon to Sun
- BBC World: 74 spots 19.00-00.00 Mon to Sun
- **Sky News: 75 spots 19.00-00.00 Mon to Sun**

Adding Value To A Schedule

Peaktime schedule - Budget of \$1million based on ratecard

■ = scenario 1 (CNN/BBC W)

■ = scenario 2 (CNN/BBC W + Sky News)



Adding Sky News to a schedule delivers stronger GRP, reach and impact, and provides a more cost efficient option.

Key Findings

- The latest EMS results continue to reflect the growing strengths and status of Sky News as a Pan European News Channel.
- For some time, EMS results have proved that every day, Sky News reaches more upscale Europeans than any other News or Business channel, reflecting channel loyalty.
- When measuring daily reach of Sky News amongst the elite EMS Select audience, the channel also remains firmly ahead of it's core competitors.
- It is not necessary to cherry pick targets for strong reach stories – Sky News leads across most relevant target groups, providing the channel with an extremely effective argument for inclusion on media plans across most key ad categories.
- As well as achieving considerable leading competitive reach at peak time, Sky News also delivers more viewers across most other day parts.
- Beyond reach, Sky News provides a cost effective option which adds considerable strength to a campaign.
- Sky News retains its strength in the UK with 20% daily reach but is NOT just a UK channel – more than half of its European reach is based outside the UK market. In addition, Sky News continues to achieve stronger reach than BBC World beyond UK/Ireland.