What Is EMS?

• With a sample of 27,887 and a universe of 48,974,000, 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 Synovate which also conducts EMS ME (Middle East), EMS Africa & PAX (Pan Asian X Media Study). Synovate 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.

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**TV Sponsors**
- Sky News
- National Geographic Channel
- BBC World News
- Bloomberg
- CNBC
- CNN
- Discovery
- DW-TV
- Euronews
- Eurosport
- RT – Russia Today
- Travel Channel
- TV 5 Monde
- France 24

**Print Sponsors**
- National Geographic Magazine
- Bloomberg BusinessWeek
- Bloomberg Markets
- The Economist
- Financial Times
- IMB
- New York Times Media Group
- TIME

**Agency/Other Sponsors**
- Kinetic
- MediaCom
- Mindshare
- OMD
- Publicitas
- Zenith Optimedia London
- Starcom Mediavest London
- Dentsu
- Initiative Media Dubai
- Universal McCann Dubai

- Aegis Media
- Mediaedge: CIA
- MPG London
- PHD
- Zenith Optimedia Paris
- Starcom Mediavest Dubai
- Hakuhodo
- Initiative Media UK
- Universal McCann UK
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>
<thead>
<tr>
<th>Country</th>
<th>Currency</th>
<th>Year Income Rounded</th>
<th>Monthly Income rounded</th>
<th>Euro**** equivalent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Austria**</td>
<td>EUR</td>
<td>37,000</td>
<td>2,900</td>
<td>2,900</td>
</tr>
<tr>
<td>Belgium</td>
<td>EUR</td>
<td>47,000</td>
<td>3,700</td>
<td>3,700</td>
</tr>
<tr>
<td>Denmark*</td>
<td>DKK</td>
<td>715,000</td>
<td>59,000</td>
<td>7,810</td>
</tr>
<tr>
<td>Finland</td>
<td>EUR</td>
<td>62,000</td>
<td>4,800</td>
<td>4,800</td>
</tr>
<tr>
<td>France</td>
<td>EUR</td>
<td>41,500</td>
<td>3,250</td>
<td>3,250</td>
</tr>
<tr>
<td>Germany**</td>
<td>EUR</td>
<td>39,500</td>
<td>3,100</td>
<td>3,100</td>
</tr>
<tr>
<td>Ireland</td>
<td>EUR</td>
<td>61,000</td>
<td>4,750</td>
<td>4,750</td>
</tr>
<tr>
<td>Italy</td>
<td>EUR</td>
<td>33,500</td>
<td>2,600</td>
<td>2,600</td>
</tr>
<tr>
<td>Luxembourg</td>
<td>EUR</td>
<td>71,500</td>
<td>5,600</td>
<td>5,600</td>
</tr>
<tr>
<td>Netherlands</td>
<td>EUR</td>
<td>55,000</td>
<td>4,300</td>
<td>4,300</td>
</tr>
<tr>
<td>Norway</td>
<td>NOK</td>
<td>860,000</td>
<td>67,000</td>
<td>8,600</td>
</tr>
<tr>
<td>Portugal</td>
<td>EUR</td>
<td>28,000</td>
<td>2,180</td>
<td>2,180</td>
</tr>
<tr>
<td>Spain</td>
<td>EUR</td>
<td>31,200</td>
<td>2,450</td>
<td>2,450</td>
</tr>
<tr>
<td>Sweden</td>
<td>SEK</td>
<td>580,000</td>
<td>45,000</td>
<td>4,910</td>
</tr>
<tr>
<td>Switzerland</td>
<td>CHF</td>
<td>116,000</td>
<td>9,000</td>
<td>7,400</td>
</tr>
<tr>
<td>Turkey****</td>
<td>TL</td>
<td>47,500</td>
<td>3,700</td>
<td>1,570</td>
</tr>
<tr>
<td>UK***</td>
<td>GBP</td>
<td>43,500</td>
<td>3,600</td>
<td>4,000</td>
</tr>
<tr>
<td>Czech Republic</td>
<td>CZK</td>
<td>345,000</td>
<td>27,000</td>
<td>1,110</td>
</tr>
<tr>
<td>Hungary</td>
<td>HUF</td>
<td>2,700,000</td>
<td>210,000</td>
<td>780</td>
</tr>
<tr>
<td>Poland**</td>
<td>PLN</td>
<td>37,800</td>
<td>2,950</td>
<td>740</td>
</tr>
<tr>
<td>Russia***</td>
<td>RUB</td>
<td>450,000</td>
<td>35,000</td>
<td>870</td>
</tr>
</tbody>
</table>
EMS Methodology

PHASE 1: Telephone Screening Survey
Eligible respondents are identified randomly.
Media and demographic data is collected
The media questionnaire is split into 12 versions; each version contains questions about half of all media titles

PHASE 2: Media Data Survey - 2/3 CATI & 1/3 Online

PHASE 3: Marketing Data Survey - Online & Postal
Data fusion techniques enable the creation of a complete and robust data set.

PLEASE NOTE: TREND ANALYSIS IS NOT POSSIBLE PRIOR TO 2010 BECAUSE OF METHODOLOGY CHANGES

Summer 2012 = 3rd release of data incorporating an updated methodology
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
Sky News Viewers At A Glance

- On average they earn a personal income of €53,706
- 62% Male: 38% Female
- Average age - 46
- 57% are educated to degree standard or higher
- 25% of viewers fall within the top 3% of the EMS universe (EMS Select)
- Nearly half took 3+ return air trips in the last year.
  - 24% took 3+ business air trips.
  - 31% took 3+ leisure air trips.
- 57% are educated to degree standard or higher
- They are 43% more likely than the average EMS respondent to be a Department Head or above.
- On average they work 46 hours per week and have responsibility for 18 employees.
- 97% are citizens of the country they reside in.
- 33% have lived/worked/been educated abroad
- On average they have 1.7 children living at home
- 60% own 2 or more cars in their household
- 23% are business decision makers.
  - They are 36% more likely than the average respondent to be an Influential Opinion Leader (4+ influential activities in the last year).
- 63% own personal investments.

Source: EMS+CEMS Full Release 2012 – All respondents base: 48,974,000, Daily Sky News viewers: 3,054,000
Opinions Of The Sky News Viewer

Average Index = 100

- I Enjoy Watching Sports Events In Public Places: 124
- More Likely To Buy/Consider Brands Advertised In International Media: 119
- I Am Always One Of 1st To Have Tech Innovative Products: 119
- I Often Donate Money To Charity: 118
- Television Advertising Is A Useful Source Of Information On New Products: 113
- It Is Difficult To Find A Balance Between My Private Life And My Work: 106
- I Prefer To Buy Well Known Brands: 112
- I Enjoy Reading Foreign Newspapers And Magazines: 112
- I Like Watching Sports To Relax: 111
- Internet Advertising Is A Useful Source Of Information On New Products: 111
- Magazine Advertising Is A Useful Source Of Information On New Products: 109
- I Value The Recommendations Of Other Consumers: 109
- Newspaper Advertising Is A Useful Source Of Info On New Products: 108
- I Often Discuss News About Other Countries: 108
- I'm Involved With Environmental/Conservation Group: 107

Source: EMS+CEMS Full Release 2012 – All respondents base: 48,974,000, Daily Sky News viewers: 3,054,000
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

<table>
<thead>
<tr>
<th>Channel</th>
<th>Top 3% Select</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sky News</td>
<td>776</td>
<td>3054</td>
</tr>
<tr>
<td>CNN</td>
<td>546</td>
<td>2057</td>
</tr>
<tr>
<td>Euronews</td>
<td>419</td>
<td>1867</td>
</tr>
<tr>
<td>BBC World News</td>
<td>425</td>
<td>1549</td>
</tr>
<tr>
<td>CNBC</td>
<td>184</td>
<td>662</td>
</tr>
<tr>
<td>Bloomberg</td>
<td>206</td>
<td>537</td>
</tr>
</tbody>
</table>

Source: EMS+CEMS Full Release 2012 – All respondents base: 48,974,000, EMS Select base: 8,599,000
### Sky News Reach By Market

<table>
<thead>
<tr>
<th>Country</th>
<th>Daily</th>
<th>Weekly</th>
<th>Monthly</th>
</tr>
</thead>
<tbody>
<tr>
<td>Austria</td>
<td>20,000 (2.2%)</td>
<td>78,000 (8.4%)</td>
<td>158,000 (16.9%)</td>
</tr>
<tr>
<td>Belgium</td>
<td>18,000 (1.6%)</td>
<td>65,000 (5.5%)</td>
<td>112,000 (9.4%)</td>
</tr>
<tr>
<td>Denmark</td>
<td>13,000 (1.7%)</td>
<td>54,000 (7.3%)</td>
<td>101,000 (13.4%)</td>
</tr>
<tr>
<td>Finland</td>
<td>191,000 (2.0%)</td>
<td>666,000 (6.9%)</td>
<td>1,187,000 (12.2%)</td>
</tr>
<tr>
<td>Neth</td>
<td>43,000 (2.6%)</td>
<td>153,000 (9.0%)</td>
<td>293,000 (17.2%)</td>
</tr>
<tr>
<td>Norway</td>
<td>22,000 (3.6%)</td>
<td>98,000 (16.4%)</td>
<td>190,000 (13.7%)</td>
</tr>
<tr>
<td>Portugal</td>
<td>191,000 (2.0%)</td>
<td>666,000 (6.9%)</td>
<td>1,187,000 (12.2%)</td>
</tr>
<tr>
<td>Russia</td>
<td>105,000 (1.9%)</td>
<td>394,000 (12.3%)</td>
<td>700,000 (21.9%)</td>
</tr>
<tr>
<td>Czech Repub</td>
<td>17,000 (1.7%)</td>
<td>57,000 (5.8%)</td>
<td>104,000 (10.6%)</td>
</tr>
<tr>
<td>Hungary</td>
<td>17,000 (2.2%)</td>
<td>67,000 (8.3%)</td>
<td>118,000 (14.7%)</td>
</tr>
<tr>
<td>Poland</td>
<td>105,000 (3.3%)</td>
<td>394,000 (12.3%)</td>
<td>700,000 (21.9%)</td>
</tr>
<tr>
<td>UK</td>
<td>1,350,000 (20.5%)</td>
<td>3,238,000 (49.1%)</td>
<td>4,636,000 (70.2%)</td>
</tr>
<tr>
<td>Austria</td>
<td>935,000</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Belgium</td>
<td>1,185,000</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Denmark</td>
<td>750,000</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Finland</td>
<td>705,000</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Neth</td>
<td>1,700,000</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Norway</td>
<td>600,000</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Portugal</td>
<td>820,000</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Czech Repub</td>
<td>982,000</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hungary</td>
<td>800,000</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Poland</td>
<td>3,200,000</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Russia</td>
<td>1,260,000</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Competitive Reach
Unrivalled Reach In the UK

Sky News daily UK reach is **434%** 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**: 1,350
- **CNN**: 253
- **Euronews**: 113
- **Bloomberg TV**: 102
- **CNBC**: 82

Source: EMS+CEMS Full Release 2012 – All respondents base: 48,974,000, UK base: 6,600,000
Sky News Beyond The UK

Sky News reaches **1,350,000** daily UK viewers.

BUT......................

It is also viewed on a daily basis by **1,704,000** viewers outside of the UK, which is **56%** of Sky News Pan European reach.

Source: EMS+CEMS Full Release 2012 – All respondents base: 48,974,000, Daily Sky News viewers: 3,054,000
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 **33%** higher than that of BBC World.

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

- Dly Sky News: 1,596
- Dly BBC World News: 1,202

Source: EMS+CEMS Full Release 2012 – All respondents Ex UK/Ireland base: 42,047,000
Sky News Offers Unique Reach

Total Sky News Daily Reach = 3,054,000
Total CNN Daily Reach = 2,057,000
Total BBC W Daily Reach = 1,549,000

14% of CNN viewers watch SNI but only 9% of SNI viewers watch CNN

18% of BBC World News viewers watch SNI but only 9% of SNI viewers watch BBC World

Source: EMS+CEMS Full Release 2012 – All respondents base: 48,974,000
### Reaching An Elite Business Audience

#### Daily Reach %

<table>
<thead>
<tr>
<th>Category</th>
<th>Sky News</th>
<th>CNN</th>
<th>Euronews</th>
<th>BBC World News</th>
<th>Bloomberg TV</th>
<th>CNBC</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business Decision Maker (7,566,000)</td>
<td>9.1</td>
<td>6.3</td>
<td>5.0</td>
<td>5.0</td>
<td>2.2</td>
<td>2.2</td>
</tr>
<tr>
<td>Influential Opinion Leader (4,258,000)</td>
<td>8.5</td>
<td>6.3</td>
<td>4.6</td>
<td>4.8</td>
<td>2.3</td>
<td>2.1</td>
</tr>
<tr>
<td>C-Suite - Private Sector (3,307,000)</td>
<td>9.1</td>
<td>5.6</td>
<td>4.9</td>
<td>4.9</td>
<td>2.1</td>
<td>2.0</td>
</tr>
<tr>
<td>C-Suite - Execs/Directors 50+/ Employees WW (2,790,000)</td>
<td>8.8</td>
<td>6.3</td>
<td>5.0</td>
<td>5.2</td>
<td>2.6</td>
<td>2.3</td>
</tr>
<tr>
<td>Head Of A Dept Or Above (5,553,000)</td>
<td>8.9</td>
<td>5.6</td>
<td>4.5</td>
<td>4.7</td>
<td>2.0</td>
<td>1.9</td>
</tr>
</tbody>
</table>

Source: EMS+CEMS Full Release 2012 – All respondents base: 48,974,000
Reaching The Upscale Consumer

Daily Reach %

- **Sky News**
- **CNN**
- **Euronews**
- **BBC World News**
- **Bloomberg TV**
- **CNBC**

<table>
<thead>
<tr>
<th>Category</th>
<th>Sky News</th>
<th>CNN</th>
<th>Euronews</th>
<th>BBC World News</th>
<th>Bloomberg TV</th>
<th>CNBC</th>
</tr>
</thead>
<tbody>
<tr>
<td>Any Personal Investments (29,693,000)</td>
<td>6.4</td>
<td>4.5</td>
<td>3.9</td>
<td>3.4</td>
<td>1.3</td>
<td>1.5</td>
</tr>
<tr>
<td>PI €80,000+ (4,362,000)</td>
<td>6.5</td>
<td>4.7</td>
<td>5.4</td>
<td>2.6</td>
<td>2.1</td>
<td></td>
</tr>
<tr>
<td>€550,000+ Value Of Private Investments (Ex Mortgage/Home) (2,005,000)</td>
<td>7.8</td>
<td>5.9</td>
<td>4.8</td>
<td>4.9</td>
<td>2.4</td>
<td>2.3</td>
</tr>
<tr>
<td>€1,500+ Approx Value Of Main Watch (4,851,000)</td>
<td>9.0</td>
<td>5.7</td>
<td>4.6</td>
<td>5.0</td>
<td>2.2</td>
<td>1.9</td>
</tr>
</tbody>
</table>

Source: EMS+CEMS Full Release 2012 – All respondents base: 48,974,000
Reaching The Frequent Traveller

Daily Reach %

- **Sky News**
- **CNN**
- **Euronews**
- **BBC World News**
- **Bloomberg TV**
- **CNBC**

<table>
<thead>
<tr>
<th>Category</th>
<th>3+ Air Trips (15,379,000)</th>
<th>3+ Business Air Trips (7,488,000)</th>
<th>3+ Private Air Trips (9,778,000)</th>
<th>6+ Air Trips (7,802,000)</th>
<th>6+ Business Air Trips (4,141,000)</th>
<th>6+ Private Air Trips (3,091,000)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Sky News</strong></td>
<td>9.2</td>
<td>9.6</td>
<td>9.6</td>
<td>10.2</td>
<td>10.6</td>
<td>10.3</td>
</tr>
<tr>
<td><strong>CNN</strong></td>
<td>6.2</td>
<td>7.5</td>
<td>6.2</td>
<td>7.5</td>
<td>8.4</td>
<td>7.4</td>
</tr>
<tr>
<td><strong>Euronews</strong></td>
<td>5.0</td>
<td>5.4</td>
<td>5.1</td>
<td>5.5</td>
<td>5.8</td>
<td>6.7</td>
</tr>
<tr>
<td><strong>BBC World News</strong></td>
<td>5.0</td>
<td>2.6</td>
<td>2.1</td>
<td>2.6</td>
<td>3.1</td>
<td>2.7</td>
</tr>
<tr>
<td><strong>Bloomberg TV</strong></td>
<td>2.1</td>
<td>6.1</td>
<td>2.2</td>
<td>2.6</td>
<td>2.8</td>
<td>2.7</td>
</tr>
<tr>
<td><strong>CNBC</strong></td>
<td>2.1</td>
<td>2.6</td>
<td>2.1</td>
<td>2.6</td>
<td>2.8</td>
<td>2.7</td>
</tr>
</tbody>
</table>

Source: EMS+CEMS Full Release 2012 – All respondents base: 48,974,000
Reaching The International Traveller

Daily Reach %

- Sky News
- CNN
- Euronews
- BBC World News
- Bloomberg TV
- CNBC

3+ International Air Trips (10,754,000):
- Sky News: 10.0%
- CNN: 6.7%
- Euronews: 5.3%
- BBC World News: 5.7%
- Bloomberg TV: 2.3%
- CNBC: 2.3%

3+ International Business Air Trips (4,475,000):
- Sky News: 10.8%
- CNN: 8.1%
- Euronews: 6.0%
- BBC World News: 7.2%
- Bloomberg TV: 3.1%
- CNBC: 2.9%

3+ International Private Air Trips (6,572,000):
- Sky News: 10.2%
- CNN: 6.4%
- Euronews: 5.4%
- BBC World News: 5.6%
- Bloomberg TV: 2.4%
- CNBC: 2.2%

1st or Business/Club - Class Used Last 2 Years on International Trips (7,120,000):
- Sky News: 8.9%
- CNN: 6.1%
- Euronews: 4.8%
- BBC World News: 5.1%
- Bloomberg TV: 2.4%
- CNBC: 2.3%

Source: EMS+CEMS Full Release 2012 – All respondents base: 48,974,000
Every week the Sky News website attracts more visitors than most other Pan European TV Websites.
The Sky News website reaches 5,424,000 upscale Europeans on a monthly basis.

- A quarter of these visitors is returning on a daily basis.
- Almost 3 out of 5 visit a few times a week or more.

Source: EMS+CEMS Full Release 2012 – All respondents base: 48,974,000
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 consistent strong reach throughout the day; across most dayparts Sky News reaches more upscale Europeans than its core competitors.

### Average Audience Mon-Sun (000)

- **Sky News**
- **CNN**
- **BBC World**
- **Euronews**
- **CNBC**
- **Bloomberg**

**Source:** EMS+CEMS Full Release 2012 – All respondents base: 48,974,000

**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 – 2400h)

Source: EMS+CEMS Full Release 2012 – All respondents base: 48,974,000
Rates: Monday-Sunday average PT rates 2011/2012
Adding Value To A Schedule

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

- **Scenario 1 – 199 spots**
  - CNN: 78 spots 19.00-00.00 Mon to Sun
  - BBC World: 121 spots 19.00-00.00 Mon to Sun

- **Scenario 2 – 215 spots**
  - CNN: 53 spots 19.00-00.00 Mon to Sun
  - BBC World: 79 spots 19.00-00.00 Mon to Sun
  - Sky News: 83 spots 19.00-00.00 Mon to Sun
Adding Sky News to a schedule delivers stronger GRP, reach and impact, and provides a more cost efficient option.

Source: EMS+CEMS Full Release 2012 – All respondents base: 48,974,000
Rates: Monday-Sunday average PT rates 2011/2012
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 its 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 peaktime, 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.