

SKY NEWS

EMS Summer 2011



WHAT IS EMS?

- With a sample of 27,028 and a universe of 47,022,000, 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 20 key markets, including 4 within Central Europe (CEMS)



Austria



Belgium

Czech
Republic

Denmark



Finland



France



Germany



Hungary



Ireland



Italy



Neth.



Norway



Poland



Portugal



Russia



Spain



Sweden



Switzerland



UK



Luxembourg

- 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.

Agency/Other Sponsors

Aviator/Kinetic
Aegis Media
MediaCom
Mediaedge: CIA
Mindshare
MPG London
OMD
Zenith Optimedia Paris
Zenith Optimedia London
Starcom Mediavest Dubai
Starcom Mediavest London
Hakuhodo
Dentsu
Initiative Media UK
Initiative Media Dubai
Universal McCann UK
Universal McCann Dubai

TV Sponsors

Sky News
National Geographic Channel
BBC World News
Bloomberg
CNBC
CNN
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
Metro International
TIME



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 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: Gross household incomes top 20% threshold

Country	currency	year rounded
Austria	EUR	36,500
Belgium	EUR	47,000
Denmark	DKK	715,000
Finland	EUR	61,000
France	EUR	41,500
Germany	EUR	39,500
Ireland	EUR	61,000
Italy	EUR	34,500
Luxembourg	EUR	71,500
Netherlands	EUR	55,000
Norway	NOK	825,000
Portugal	EUR	28,800
Spain	EUR	31,200
Sweden	SEK	570,000
Switzerland	CHF	116,000
UK	GBP	43,500
Czech Repub	CZK	345,000
Hungary	HUF	2,700,000
Poland	PLN	37,800
Russia	RUB	425,000



EMS METHODOLOGY

Summer 2011 = 2nd release of data incorporating an updated 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 ONLY POSSIBLE ACROSS 2010 & 2011 BECAUSE OF METHODOLOGY CHANGES



EMS SELECT

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

WHY EMS SELECT?

EMS Select provides measurement of an elite segment within the EMS survey; 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 IT INCLUDE?

1) Top Managers

Senior managers at establishments with 10+ employees

+

Responsible for 1+ employees

+

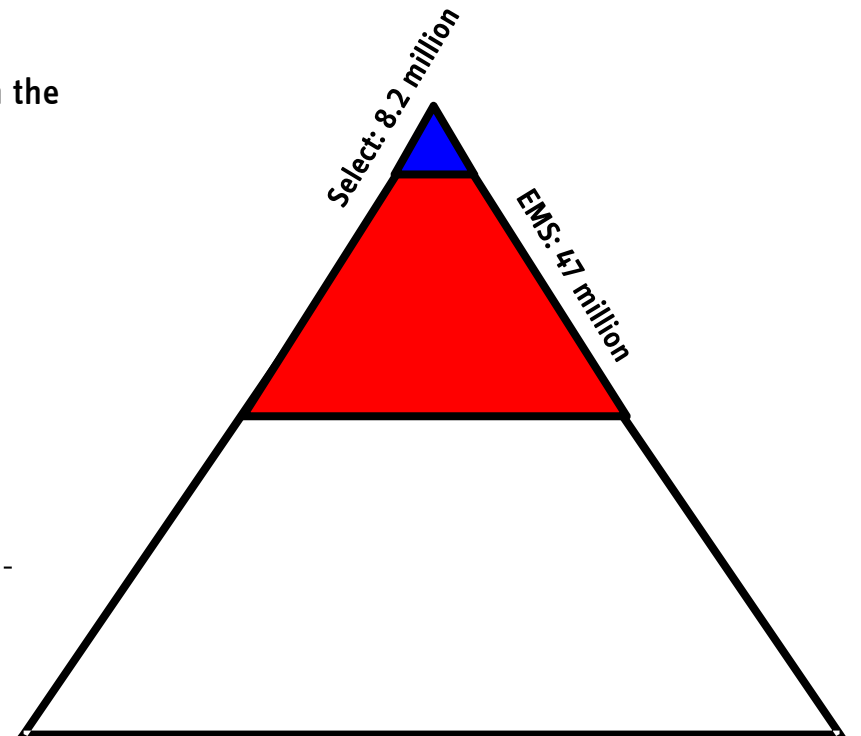
Personal income of €40k+

2) Frequent Flyers

6+ international business air trips

3) High Income Earners

Personal income of €80k



SKY NEWS VIEWER SNAPSHOT



SKY NEWS VIEWERS AT A GLANCE

On average they earn a personal income of **€57,013**

24% are business decision makers.
They are **31% more likely** than the average respondent to be an Influential Opinion Leader (4+ influential activities in the last year).

86% own personal investments.

Average age - **46**

60% Male : 40% Female

56% are educated to degree standard or higher

25% of viewers fall within the top 5% of the EMS universe

Nearly half took 3+ return air trips in the last year.

24% took 3+ business air trips.

30% took 3+ leisure air trips.

They are **42%** 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 **20 employees**.

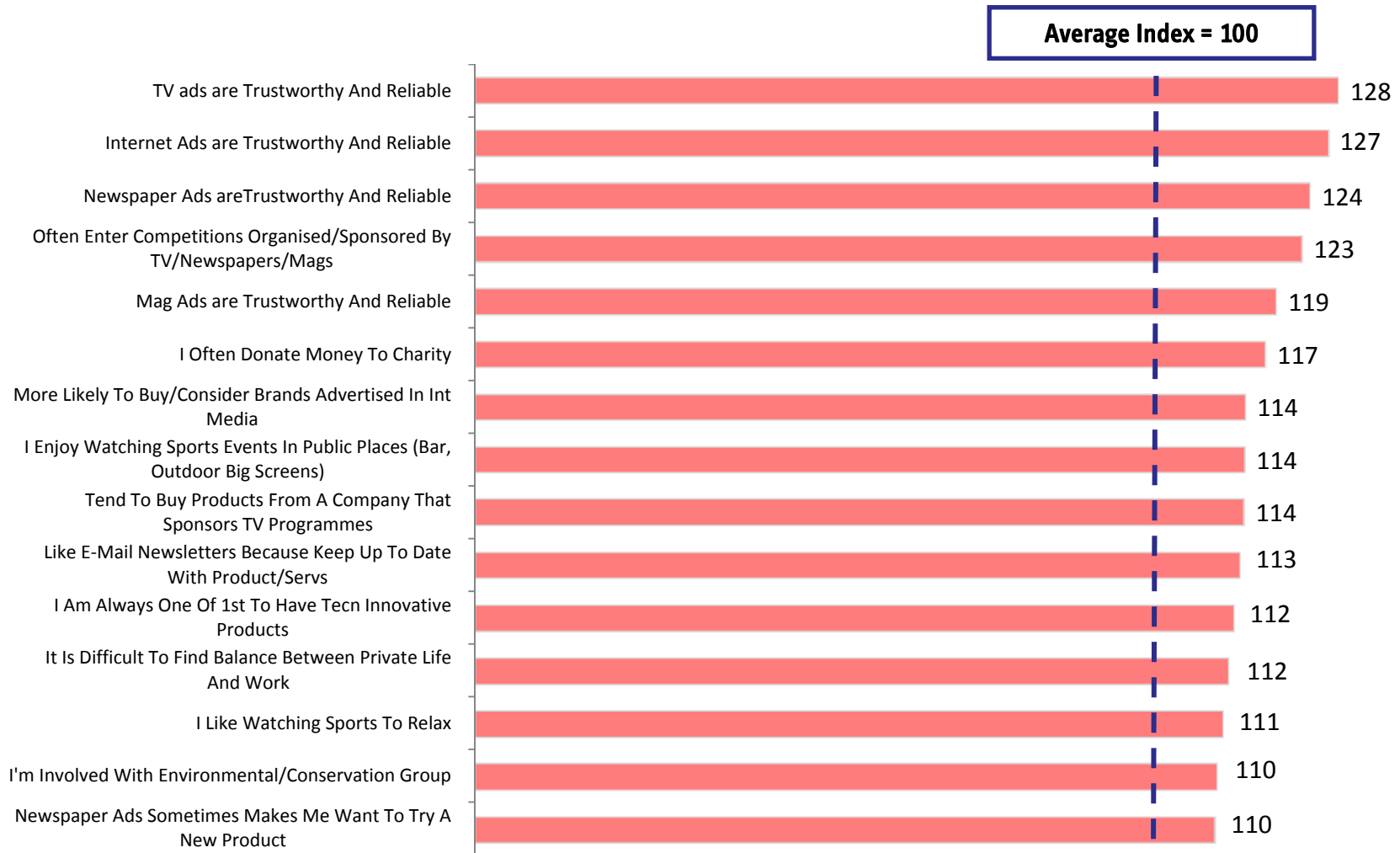
96% are citizens of the country they reside in.
41% have lived/worked/been educated abroad

On average they have **1.7 children** living at home

67% own 2 or more cars in their household



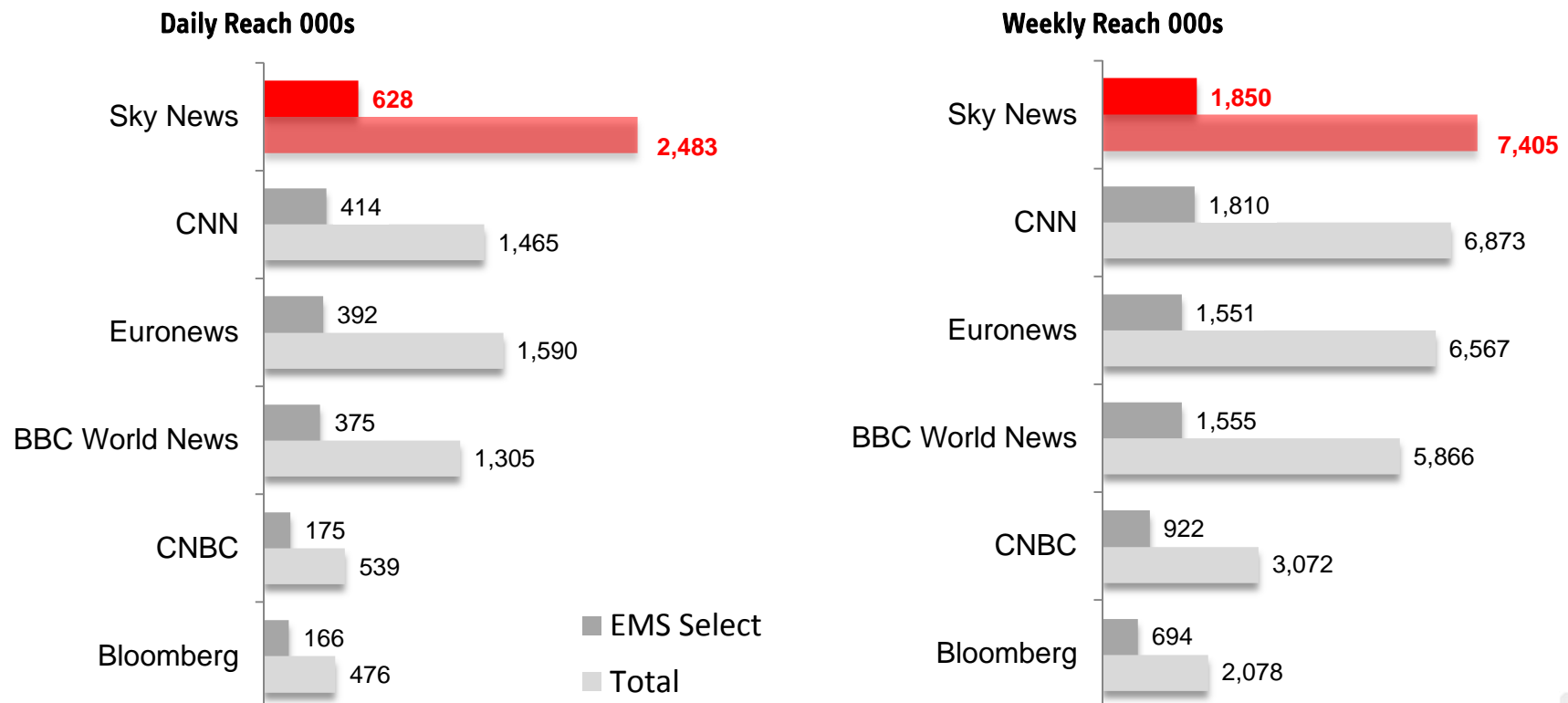
OPINIONS OF THE SKY NEWS VIEWER












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.



SKY NEWS REACH BY MARKET

 <p>Austria (930,000) Daily : 23,000 (2.5%) Weekly: 105,000 (11.3%) Monthly: 197,000 (21.2%)</p>	 <p>Belgium (1,178,000) Daily : 10,000 (0.9%) Weekly: 44,000 (3.7%) Monthly: 79,000 (6.7%)</p>	 <p>Denmark (745,000) Daily : 12,000 (1.6%) Weekly: 49,000 (6.6%) Monthly: 99,000 (13.4%)</p>	 <p>Finland (699,000) Daily : 4,000 (0.6%) Weekly: 25,000 (3.6%) Monthly: 57,000 (8.1%)</p>
 <p>France (6,565,000) Daily : 51,000 (0.8%) Weekly: 237,000 (3.6%) Monthly: 473,000 (7.2%)</p>	 <p>Germany (9,646,000) Daily : 147,000 (1.5%) Weekly: 637,000 (6.6%) Monthly: 1,189,000 (12.3%)</p>	 <p>Ireland (325,000) Daily : 91,000 (28.2%) Weekly: 211,000 (65.0%) Monthly: 280,000 (86.0%)</p>	 <p>Italy (5,202,000) Daily : 630,000 (12.1%) Weekly: 1,511,000 (29.1%) Monthly: 2,204,000 (42.4%)</p>
 <p>Luxembourg (49,000) Daily : 2,000 (3.5%) Weekly: 5,000 (10.5%) Monthly: 11,000 (21.6%)</p>	 <p>Neth (1,682,000) Daily : 34,000 (2.0%) Weekly: 140,000 (8.3%) Monthly: 290,000 (17.2%)</p>	 <p>Norway 594,000) Daily : 23,000 (3.8%) Weekly: 79,000 (13.3%) Monthly: 138,000 (23.3%)</p>	 <p>Portugal (816,000) Daily : 61,000 (7.5%) Weekly: 249,000 (30.5%) Monthly: 448,000 (54.9%)</p>
 <p>Spain (3,652,000) Daily : 52,000 (1.4%) Weekly: 203,000 (5.6%) Monthly: 386,000 (10.6%)</p>	 <p>Sweden (1,280,000) Daily : 18,000 (1.4%) Weekly: 88,000 (6.9%) Monthly: 173,000 (13.5%)</p>	 <p>Switzerland (877,000) Daily : 10,000 (1.2%) Weekly: 51,000 (5.8%) Monthly: 115,000 (13.1%)</p>	 <p>UK (6,554,000) Daily : 1,158,000 (17.7%) Weekly: 3,091,000 (47.2%) Monthly: 4,679,000 (71.4%)</p>
 <p>Czech Repub (982,000) Daily : 10,000 (1.0%) Weekly: 47,000 (4.8%) Monthly: 95,000 (9.7%)</p>	 <p>Hungary (801,000) Daily : 17,000 (2.1%) Weekly: 69,000 (8.6%) Monthly: 126,000 (15.7%)</p>	 <p>Poland (3,195,000) Daily : 107,000 (3.3%) Weekly: 484,000 (15.1%) Monthly: 883,000 (27.6%)</p>	 <p>Russia (1,250,000) Daily : 23,000 (1.8%) Weekly: 80,000 (6.4%) Monthly: 141,000 (11.3%)</p>



SKY NEWS COMPETITIVE REACH

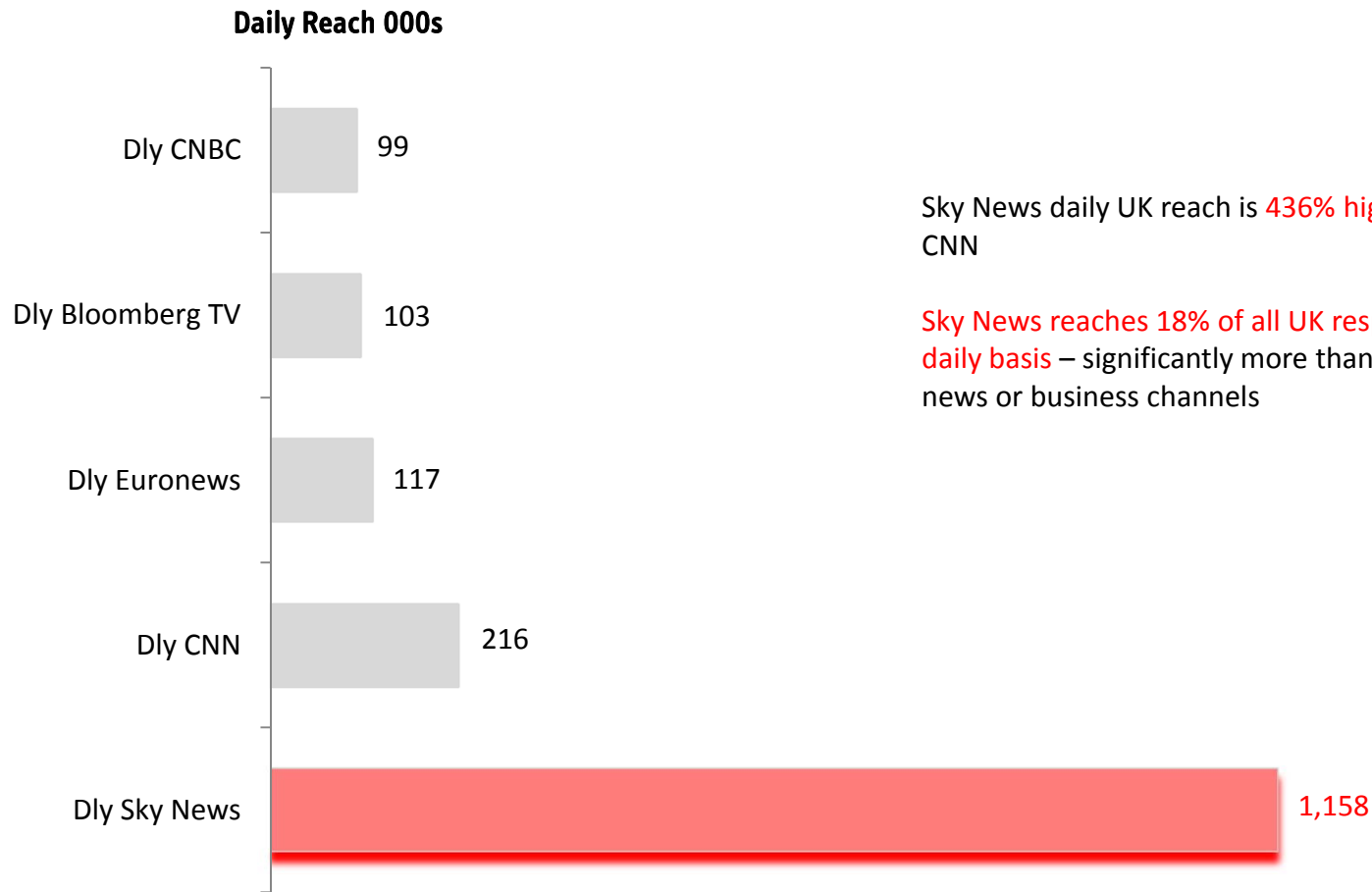


PLANNING WITH DAILY AND WEEKLY REACH

- To qualify as a daily/weekly/monthly viewer of any channel you only need to have actually watched for 2 minutes during that time.
- People notoriously flick on to news channels as and when there is a gap in their viewing. But **daily reach indicates a loyalty beyond “ad break browsing”**; it indicates a familiarity which makes that channel the first choice for current affairs information.
- **News and business channels generally trade on daily reach** - it is easy to look at large numbers surrounding broader reach and plan a campaign based on that, but by drilling down to daily reach you are measuring true, loyal brand consumers.
- EMS is a constantly developing survey in a rapidly changing and growing media landscape. With the vast quantity of media available, **regular return to any channel will obviously have a significant impact on ad awareness** and as such, daily reach needs to be taken more seriously as a measurement.



SKY NEWS DELIVERS UNRIVALLED REACH IN THE UK

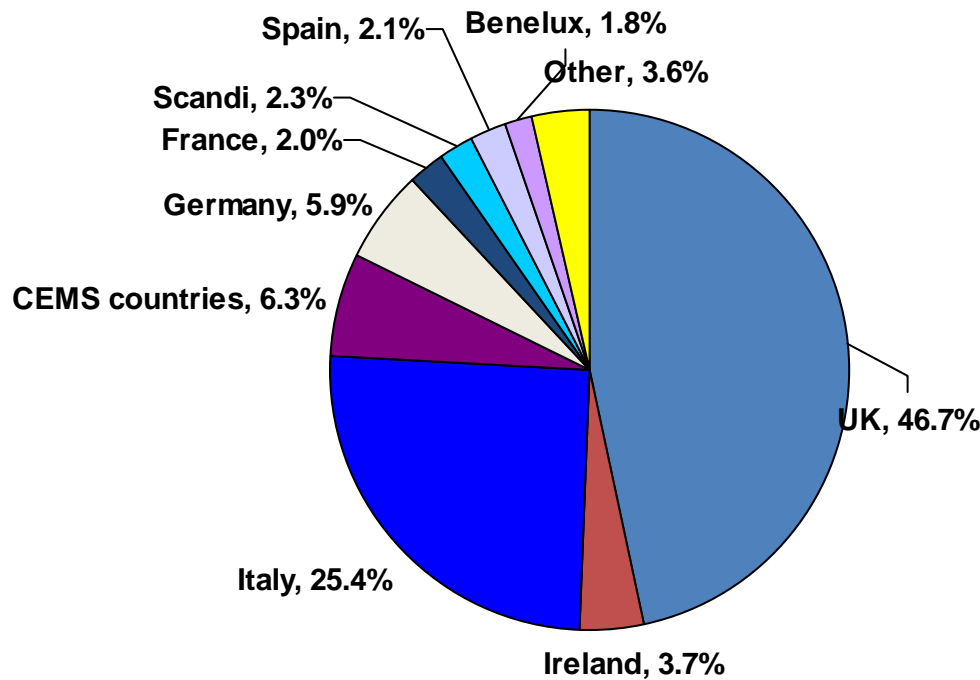


Sky News daily UK reach is **436% higher** than that of CNN

Sky News reaches 18% of all UK respondents on a daily basis – significantly more than any other PE news or business channels



MORE THAN HALF OF SKY NEWS DAILY VIEWERS RESIDE OUTSIDE OF THE UK



Sky News reaches 1,158,000 daily UK viewers.

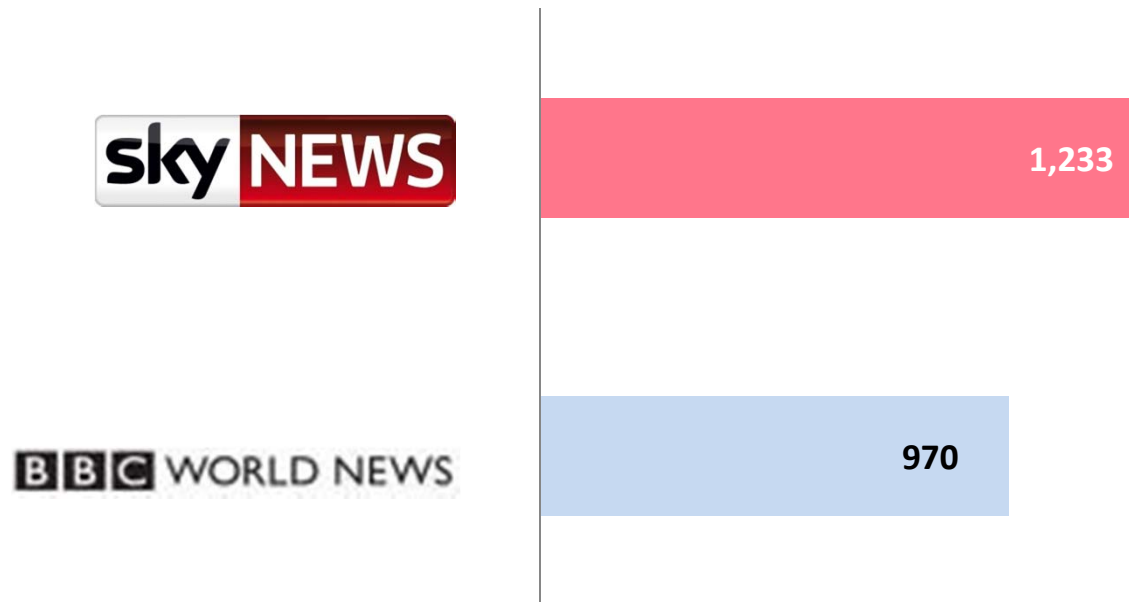
BUT.....

It is also viewed on a daily basis by 1,325,000 viewers outside of the UK



SKY NEWS DELIVERS MORE VIEWERS THAN BBC WORLD ON THE INTERNATIONAL FEED ALONE.....

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

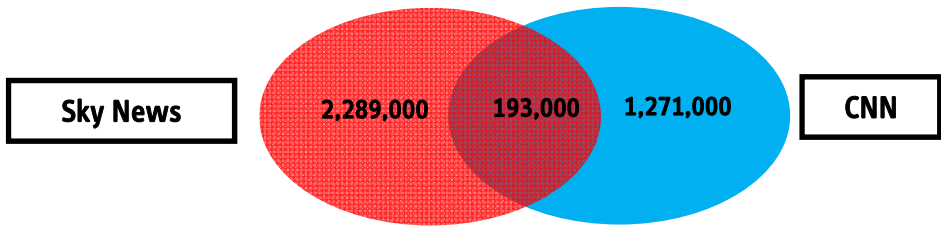


Despite its reputation as a UK news channel, beyond the UK and Ireland, Sky News delivers Pan European reach which is 27% higher than that of BBC World.

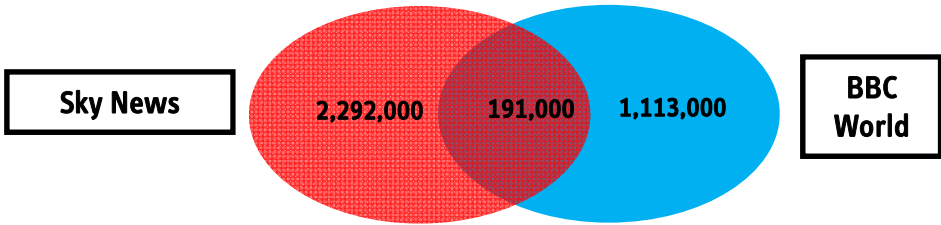


SKY NEWS DELIVERS HIGH UNIQUE REACH ON A DAILY BASIS

Total Sky News Daily Reach = 2,483,000
Total CNN Daily Reach = 1,465,000
Total BBC W Daily Reach = 1,305,000



15% of CNN viewers watch SNI but only 8% of SNI viewers watch CNN



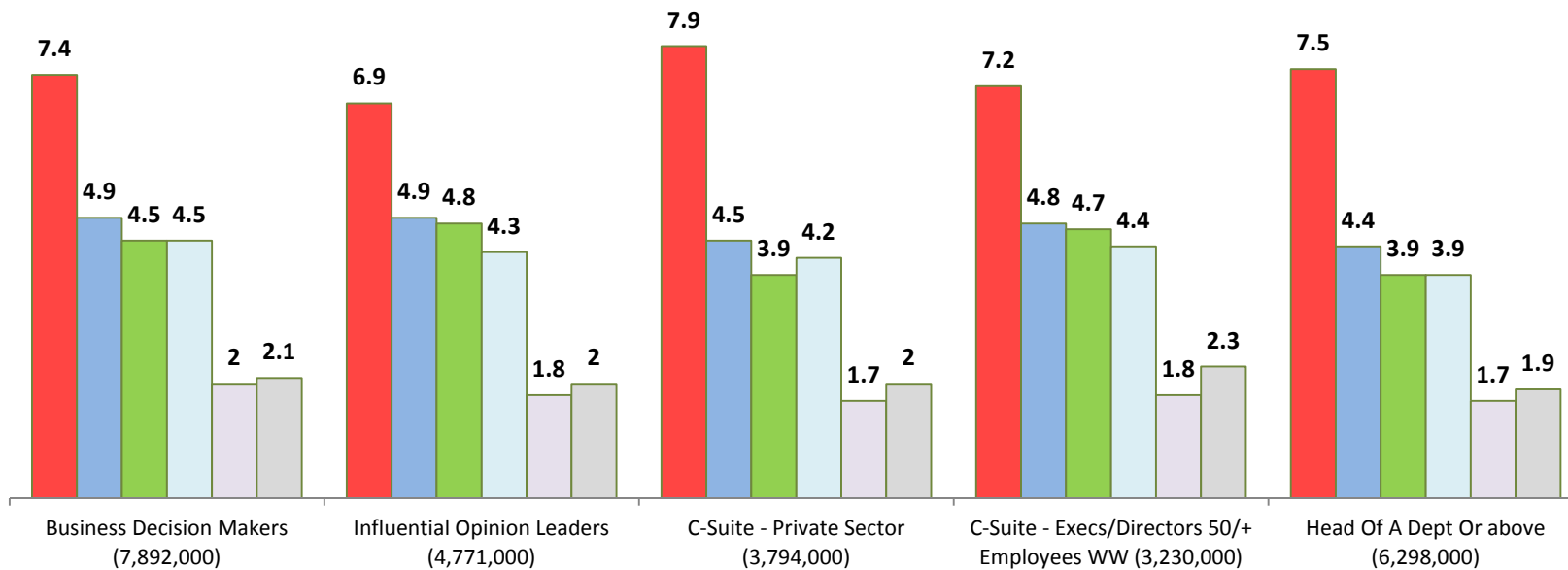
17% of BBC World News viewers watch SNI but only 8% of SNI viewers watch BBC World News



SKY NEWS REACHES AN ELITE BUSINESS AUDIENCE

Daily Reach (%)

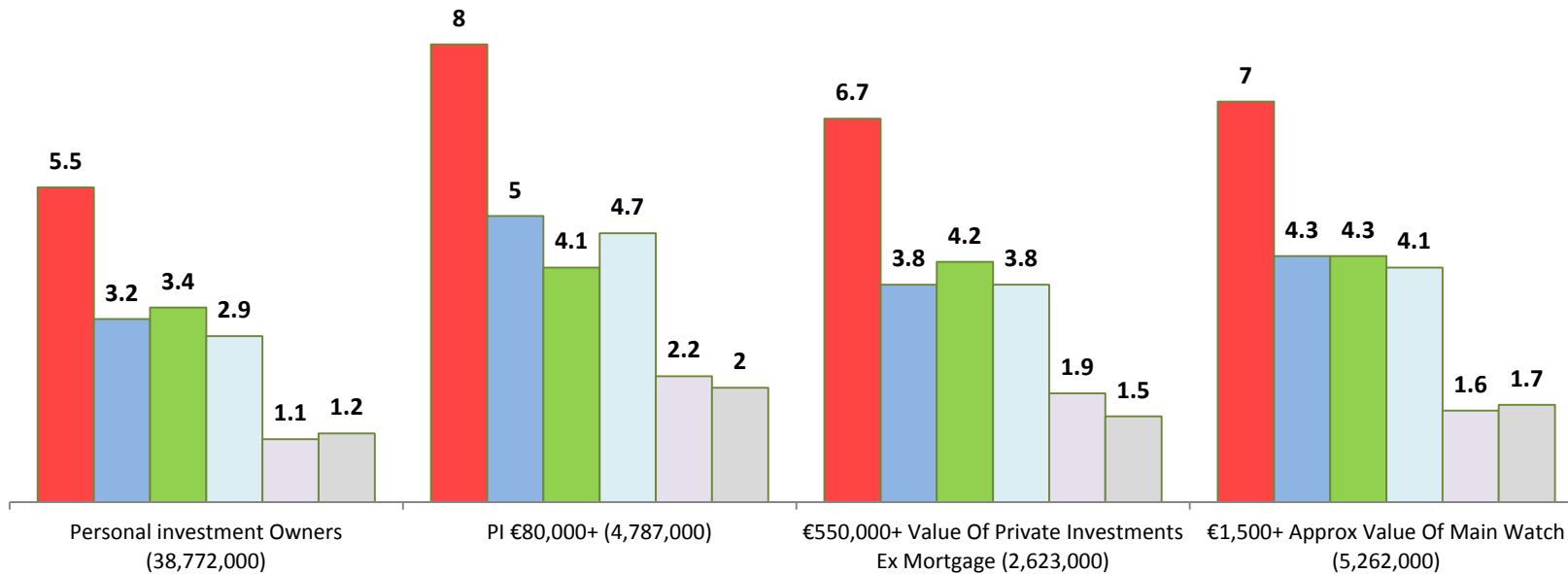
■ Sky News
 ■ CNN
 ■ Euronews
 ■ BBC World News
 ■ Bloomberg
 ■ CNBC



SKY NEWS REACHES THE UPSCALE CONSUMER

Daily Reach (%)

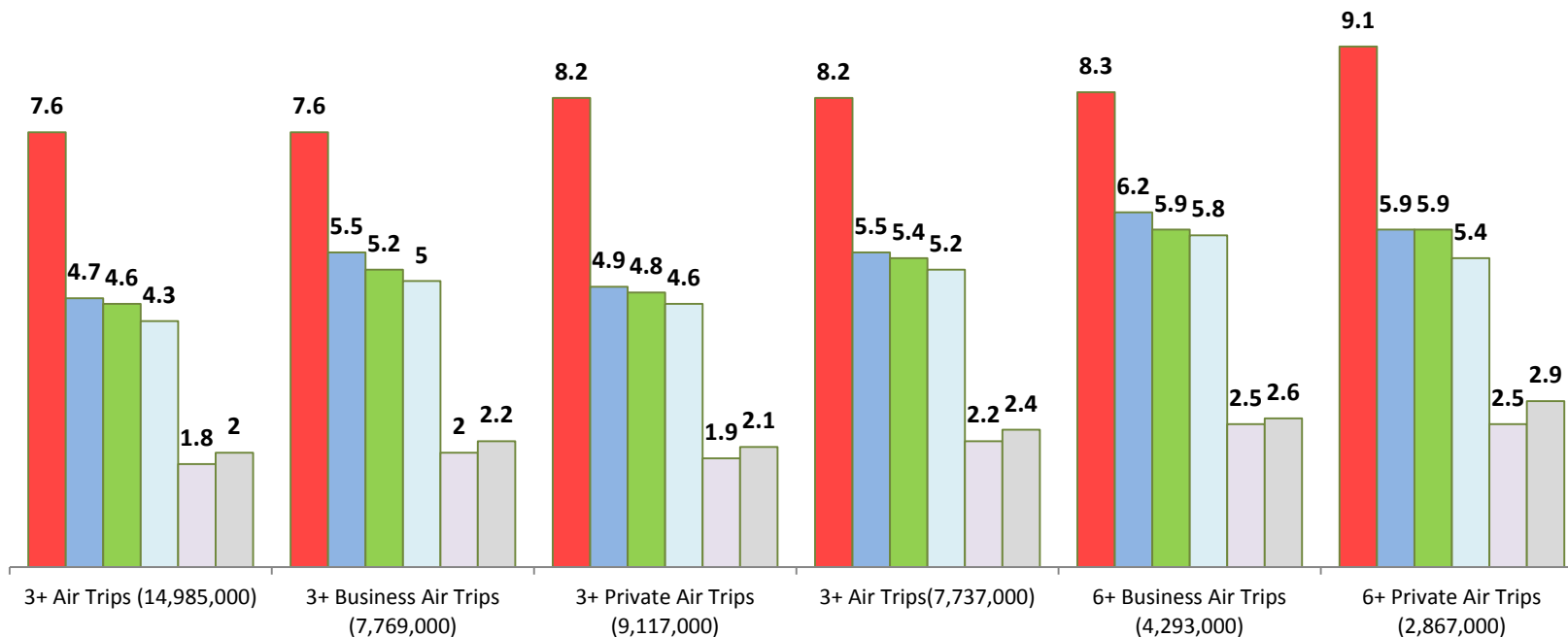
■ Sky News
 ■ CNN
 ■ Euronews
 ■ BBC World News
 ■ Bloomberg
 ■ CNBC



SKY NEWS REACHES THE FREQUENT TRAVELLER

Daily Reach (%)

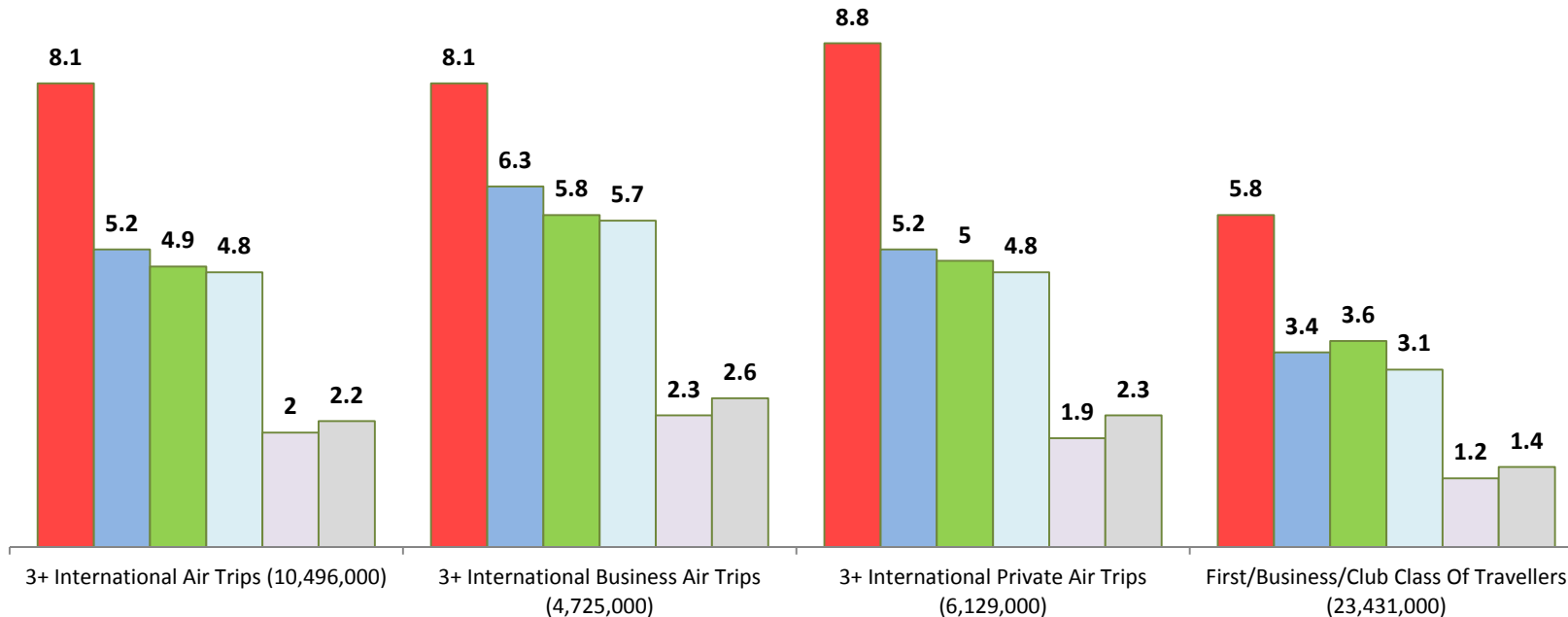
■ Sky News
 ■ CNN
 ■ Euronews
 ■ BBC World News
 ■ Bloomberg
 ■ CNBC



SKY NEWS REACHES THE INTERNATIONAL /UPSCALE TRAVELLER

Daily Reach (%)

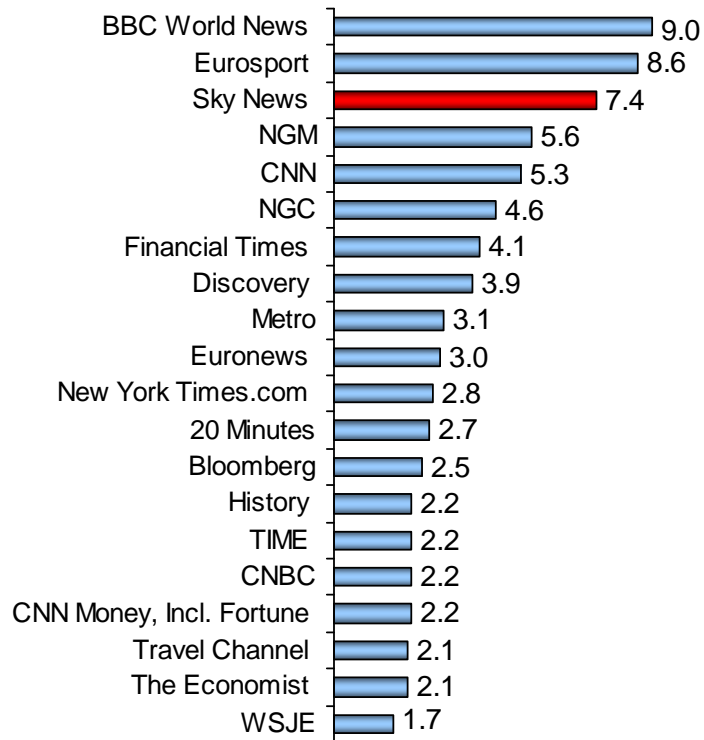
■ Sky News ■ CNN ■ Euronews ■ BBC World News ■ Bloomberg ■ CNBC



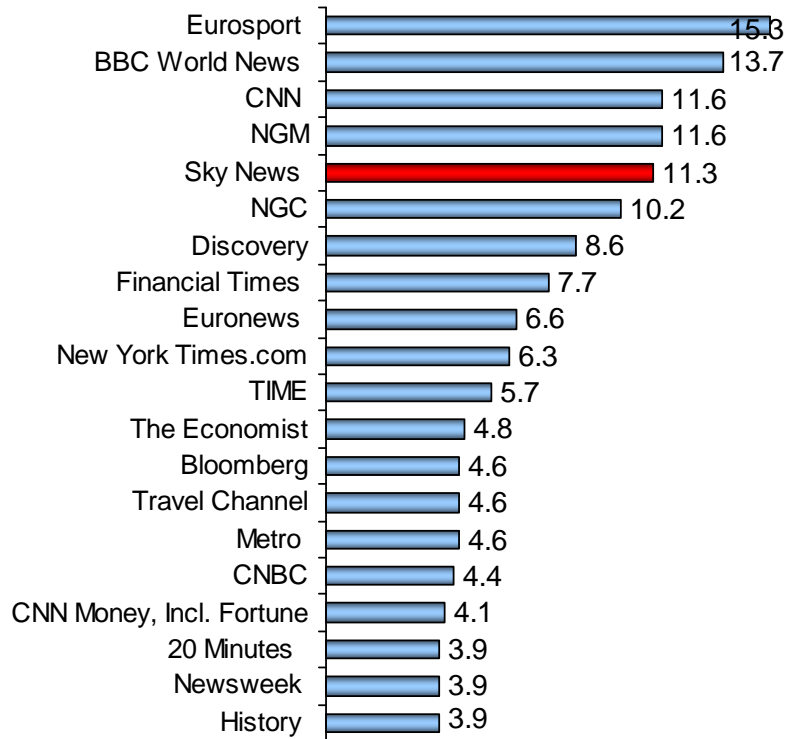
SKY NEWS WEBSITE REACH

Every month, more than 1 in 10 upscale Europeans visits the Sky News website to keep them informed and up to date with breaking news

Weekly Reach %



Monthly Reach %



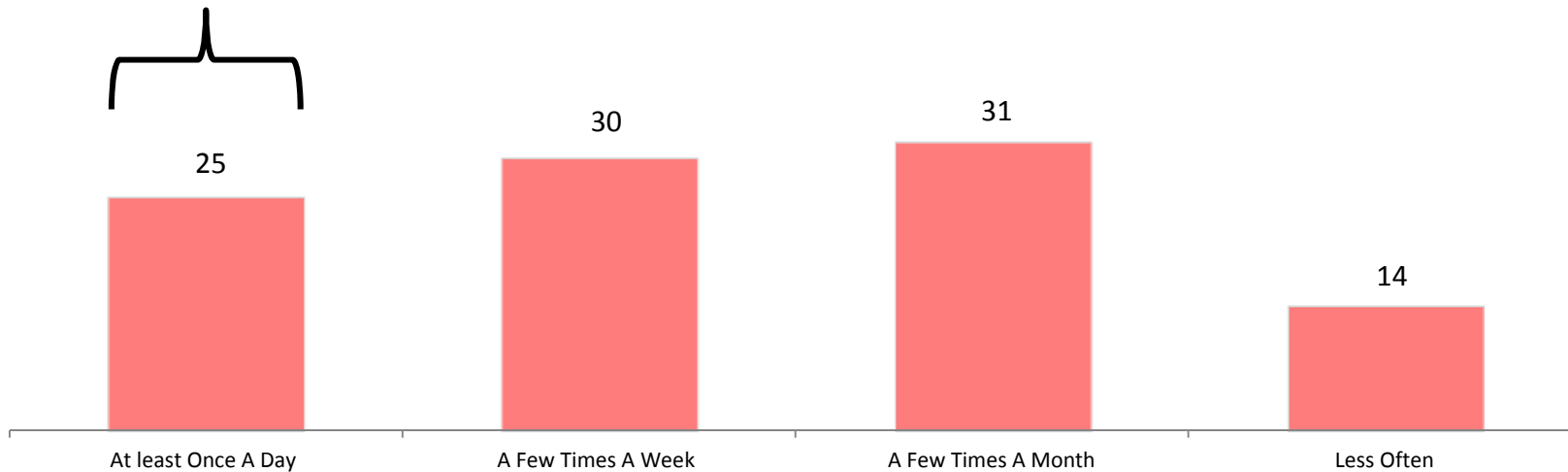
FREQUENCY OF VISITING SKYNEWS.COM

Profile %– Monthly Visitors

The Sky News website reaches **5,326,000** upscale Europeans on a monthly basis

1 quarter of these visitors is returning on a daily basis

Over Half are visiting a few times a week or more



DAYPART EMS REACH

Asked during the telephone questionnaire

TV

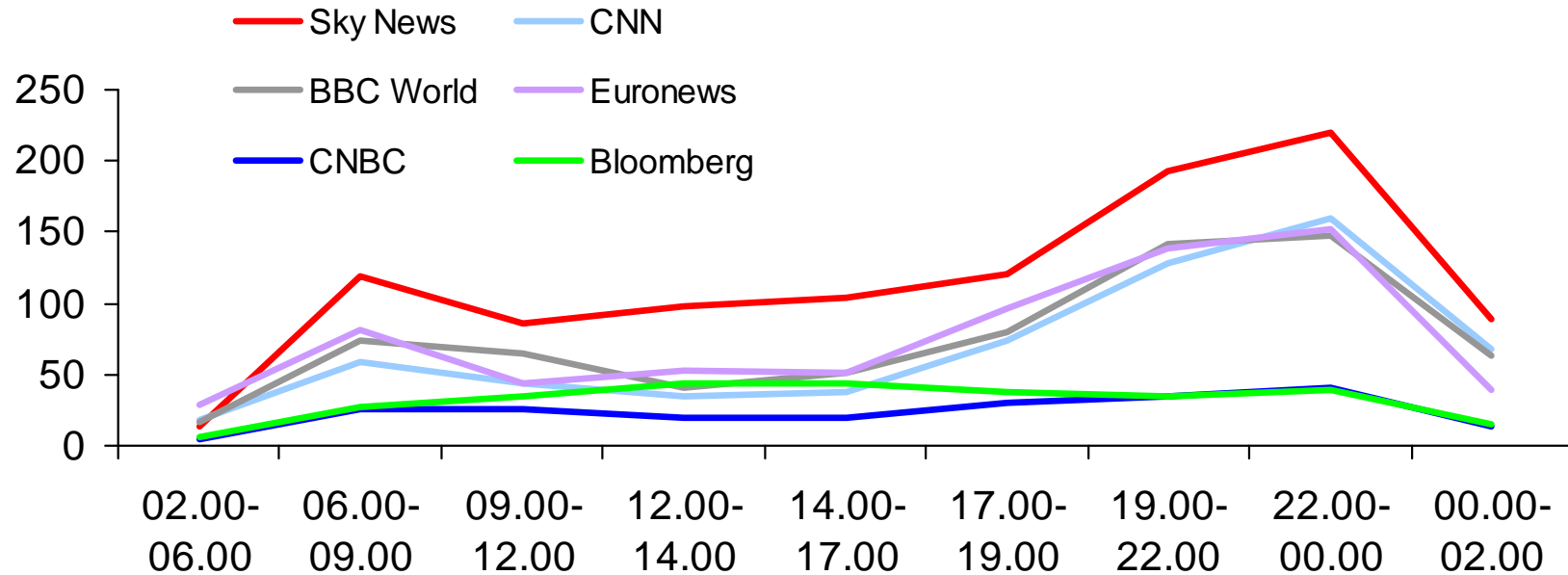
- Respondents are asked during which time periods yesterday they watched each channel for at least 2 minutes.
- They are then asked:
 - When did you start watching this channel?
 - When did you stop watching this channel?
 - Did you watch continuously during this period?
 - Were there any other periods in this day part when you were watching?
- Interviewers then code this into 9 day parts
- **ONLINE**
- Respondents are asked:
 - Did you visit in the last 30 days?
 - Apart from today and yesterday, when was the last time you visited?
 - Frequency during the last month
- Probabilities are then assigned to show average day unique visitors



LEADING THE FIELD ACROSS THE DAY

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

Average Audience Mon-Sun (000)



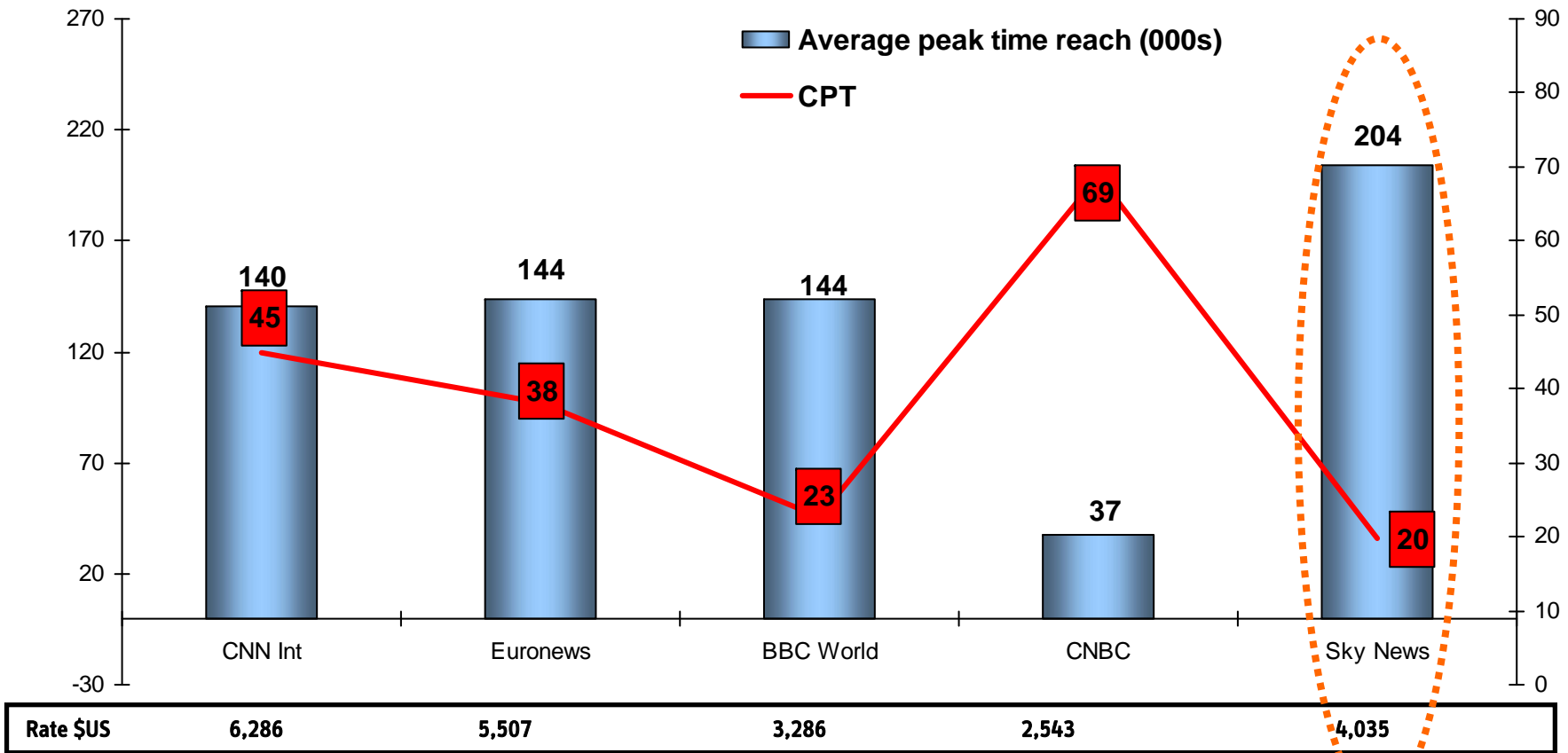
EMS Ratings: Day parts viewed by channel yesterday per quarter hour



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 - 2400h)



Source: EMS Summer 2011 – All respondents base: 47,022,000
 Rates: Monday-Sunday average PT Rates 2010



SKY NEWS ADDS VALUE TO A SCHEDULE

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

■ **Scenario 1 – 232 spots**

- **CNN: 81 spots 19.00-00.00 Mon to Sun**
- **BBC World: 151 spots 19.00-00.00 Mon to Sun**

■ **Scenario 2 – 239 spots**

- **CNN: 53 spots 19.00-00.00 Mon to Sun**
- **BBC World: 103 spots 19.00-00.00 Mon to Sun**
- **Sky News: 83 spots 19.00-00.00 Mon to Sun**



SKY NEWS OFFERS COST EFFICIENCY

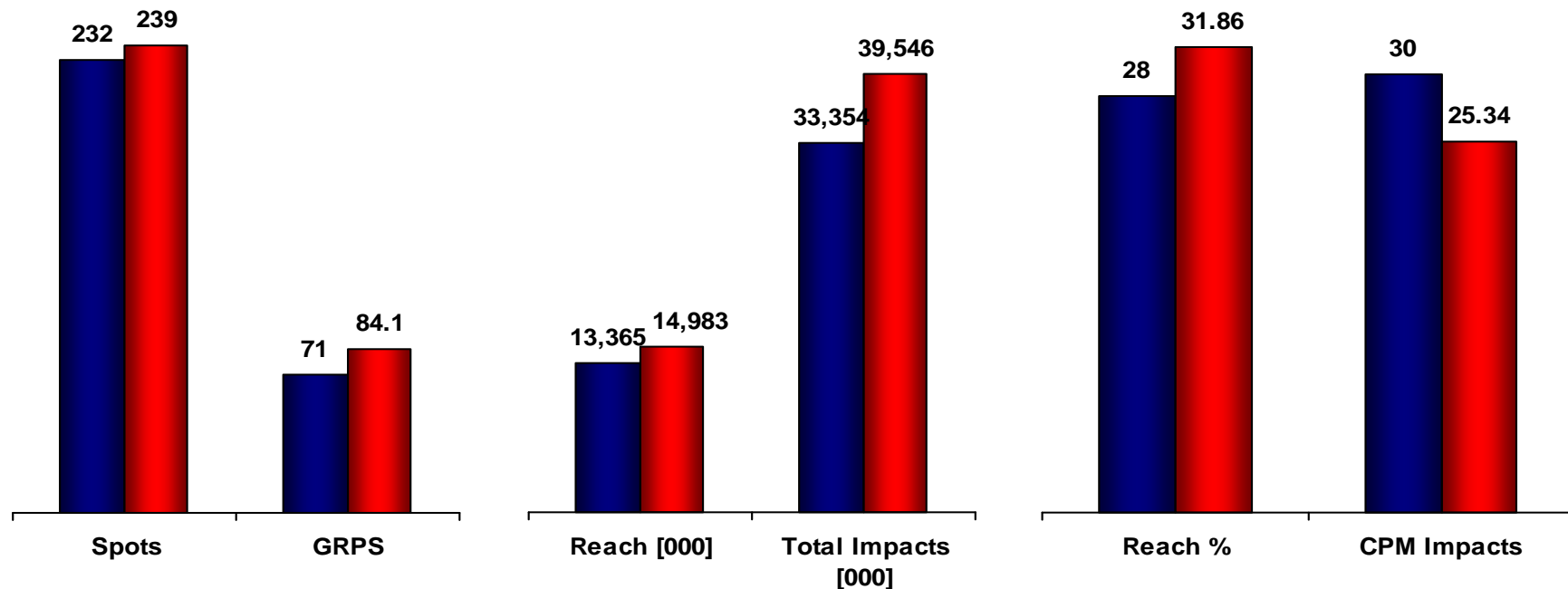
Peaktime schedule - Budget of \$1million based on ratecard



= scenario 1 (CNN/BBC W)



= scenario 2 (CNN/BBC W + Sky News)



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



KEY FINDINGS

- **These latest EMS results really highlight the growing strengths of Sky News as a Pan European News Channel.**
- **For some time, EMS results have demonstrated that every day, Sky News reaches more upscale Europeans than any other News or Business channel, reflecting channel loyalty.**
- **These latest results have seen Sky News further strengthen it's position by also achieving leading weekly reach vs main competitors, jumping ahead of Euronews & CNN for this measurement.**
- **Sky News competitive performance across the elite EMS Select audience is equally strong in terms of daily and weekly reach rankings.**
- **It is not necessary to cherry pick targets – Sky News leads across most key target groups.**
- **As well as achieving leading competitive reach at peaktime, Sky News also delivers more viewers across most day parts.**
- **Beyond reach, Sky News provides a cost effective campaign option.**
- **Sky News retains its strength in the UK with 18% daily reach but is NOT just a UK channel – more than half of its European reach is based outside the UK market**

