



sky | MEDIA

What the Breakfast Club is for...



Who are we, what's our story



We are a content provider and a product and service innovator

Our consistent thread to believe in better

We strive to put our customers at the heart and maintain broad appeal

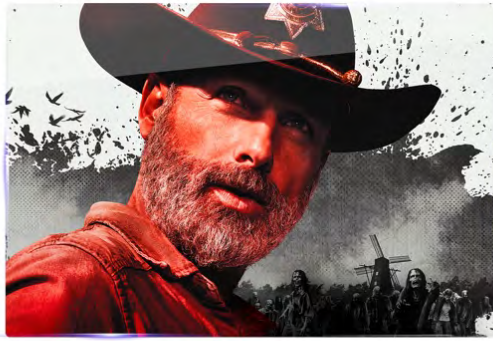
To bring better content and innovation to all of our customers; better connecting them to more of what they love

Double meaning: we help our customers connect emotionally and physically

We allow our customers to tap into their passions



TV worth paying for



<2019 REEL VIDEO>

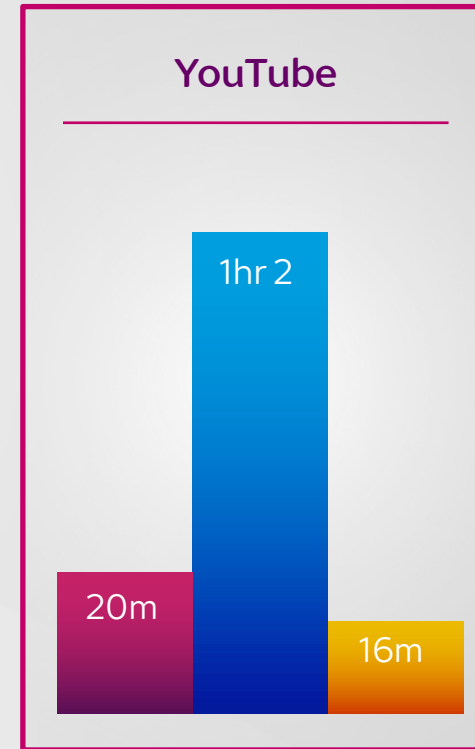
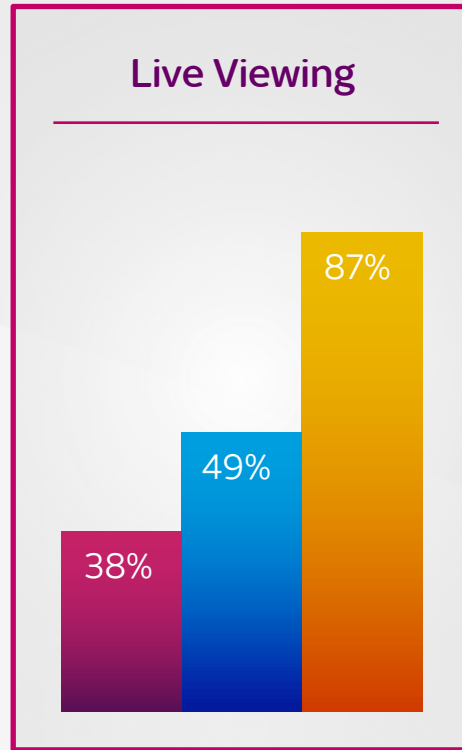
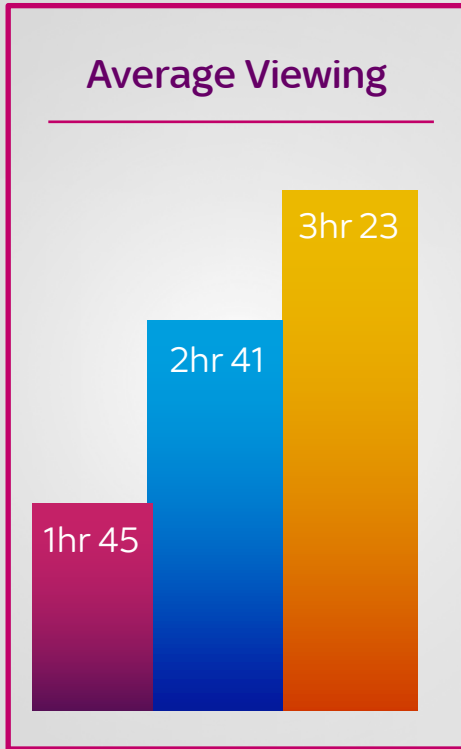
Continuing Power of TV

- Weekly reach - 94% of population
- 3hr 23 a day average
- Most trusted medium
- Brand safe environment
- Transparent and robust measurement
- Not all views are equal



The Consumption Assumption...

- Ad people's self estimate
- Estimate of 'normal people'
- Actual data



PREMIUM CONTENT



CUSTOMER INSIGHT

Sky has played a role in elevating the viewing experience

Superior flexibility

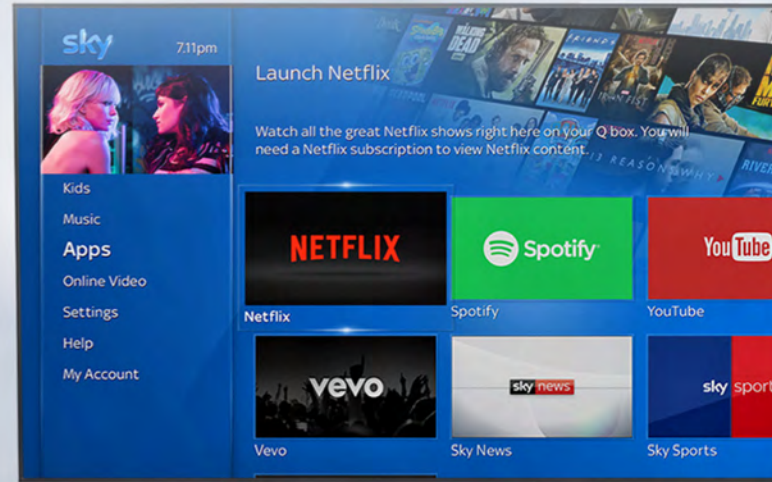


Superior experience

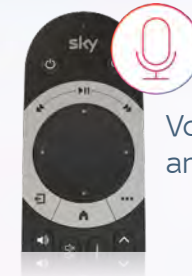
Ultra HD

Sky Soundbox

VR

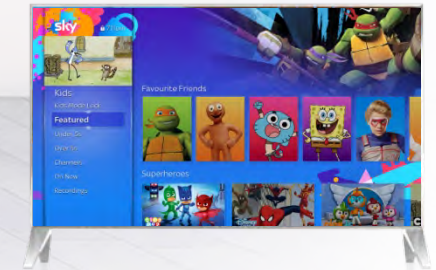


Superior control



Voice search and control

Superior personalisation

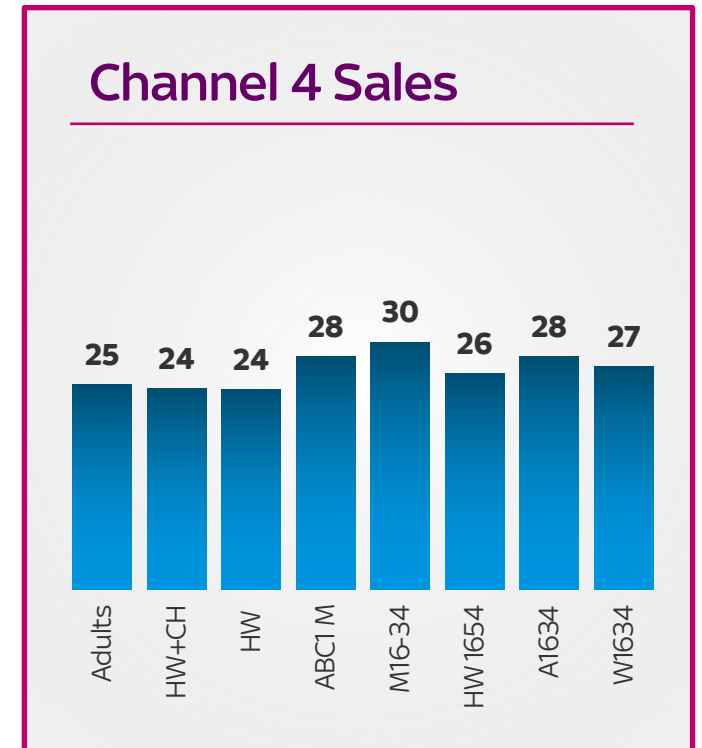
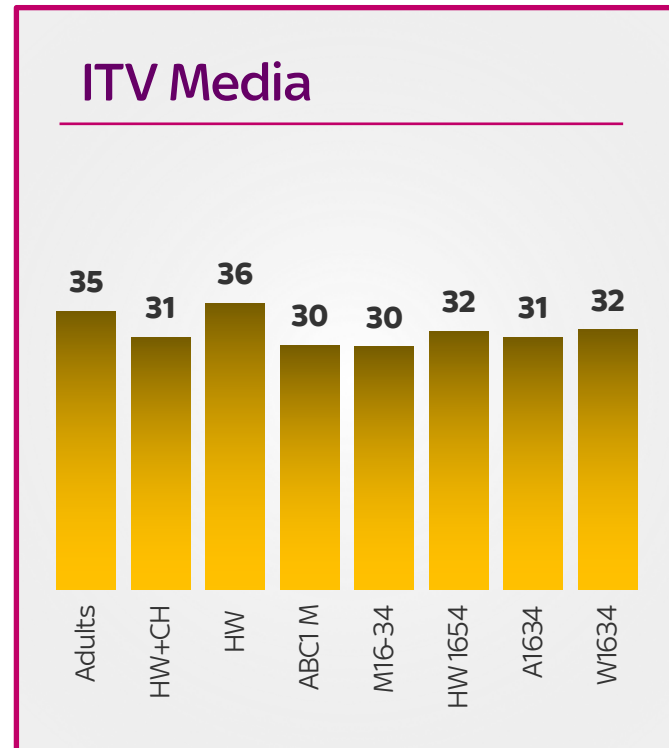
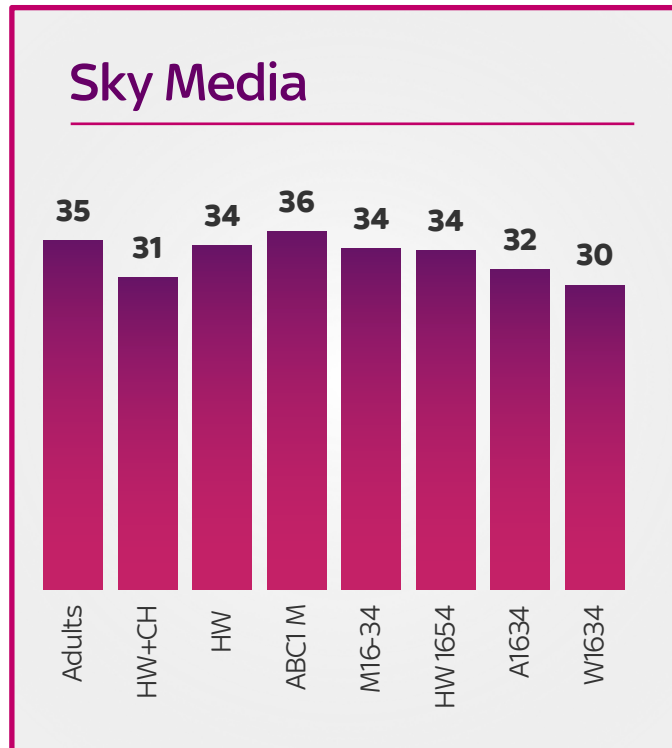


Superior choice



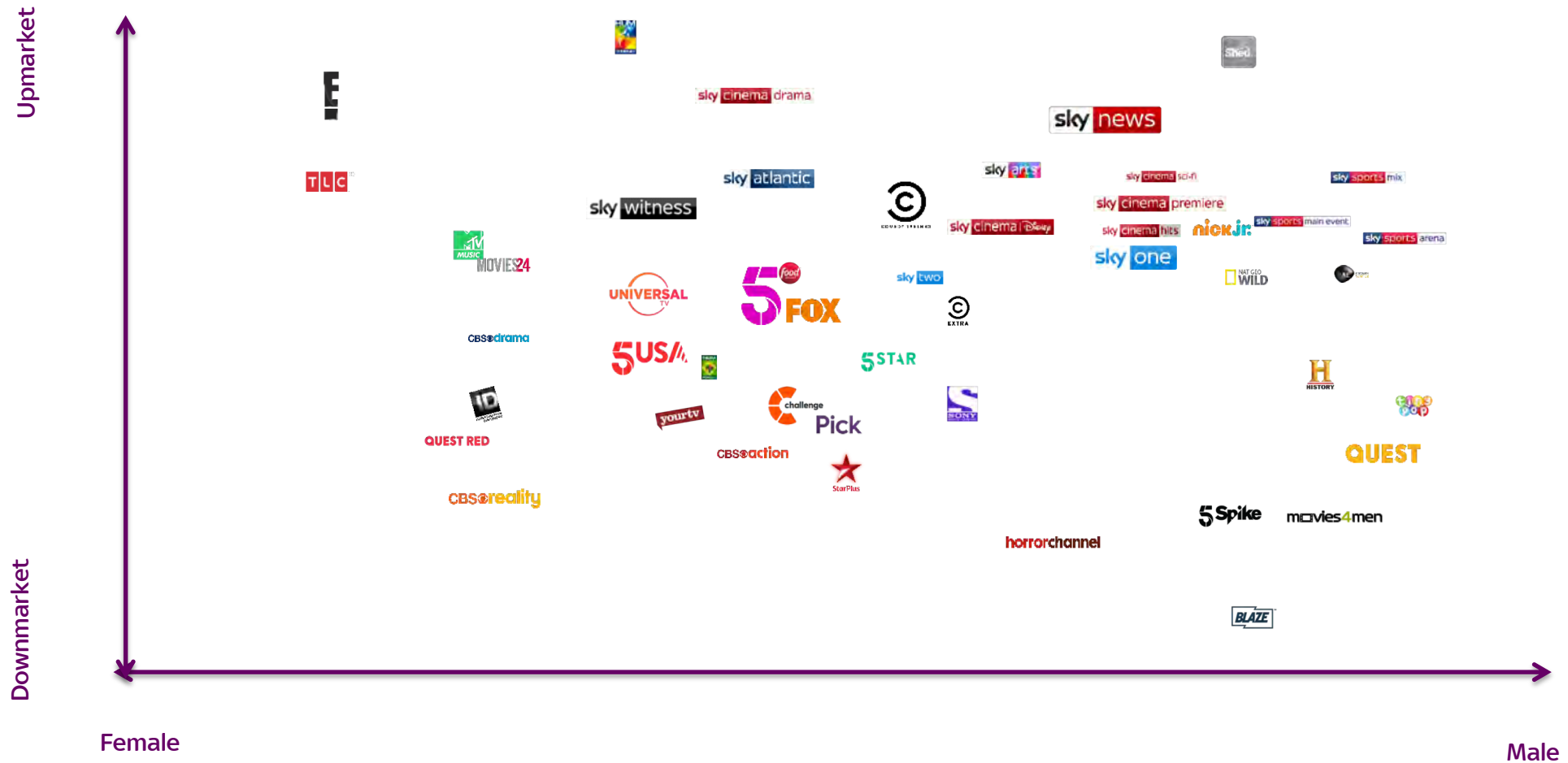
The broadcaster landscape has changed

Key trading audiences (% share)



The Sky Media portfolio has something for everyone

Audience profiles 2018



We can drive incremental reach across platforms and devices

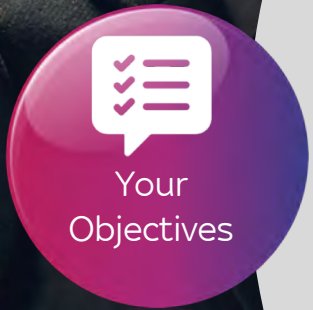
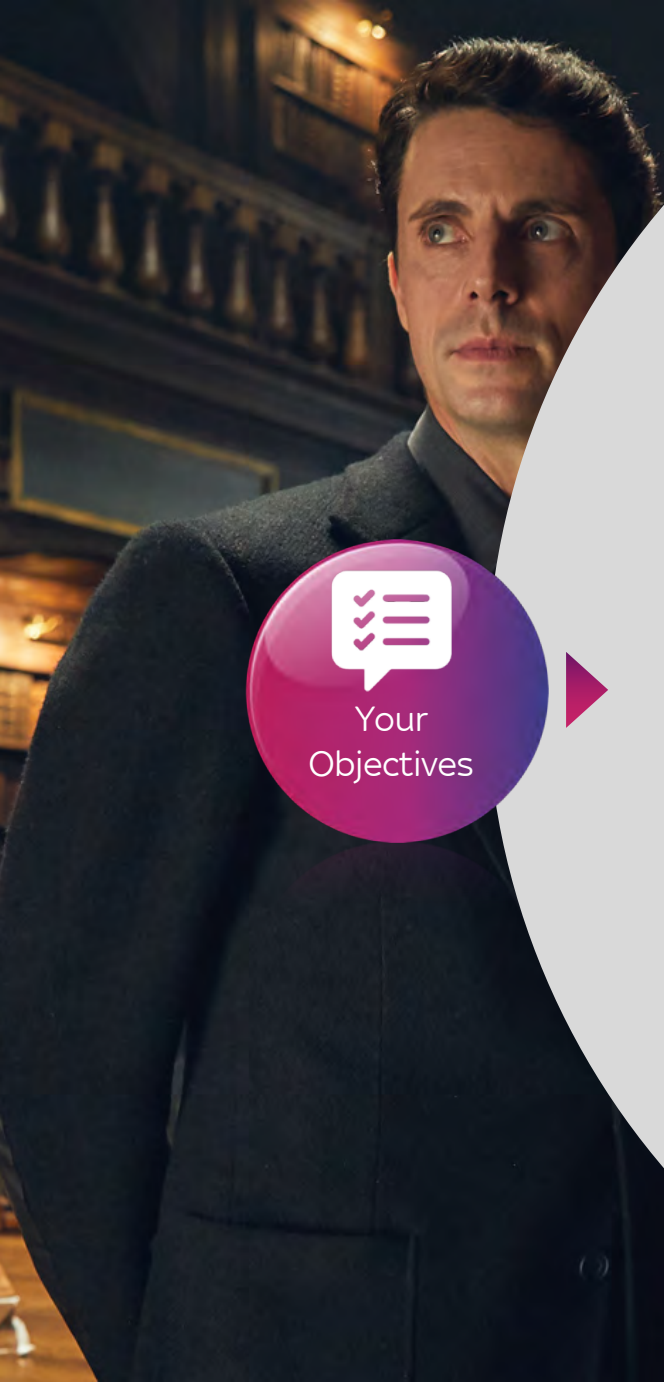




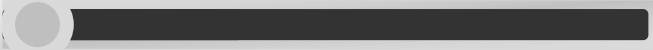
Change
In how we
talk
to agencies
& brands

sky one

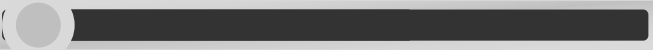
The Reluctant Landlord



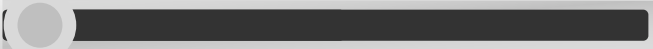
BROADCAST TV



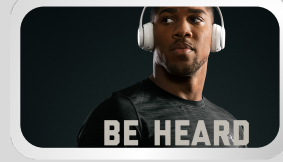
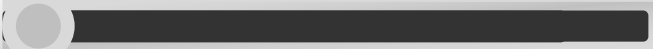
ON DEMAND TV



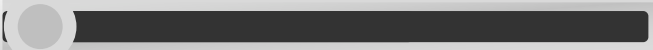
TV SPONSORSHIP



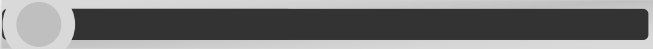
ADDRESSABLE




CREATIVE SOLUTIONS



ONLINE & SOCIAL



Reach is a common objective



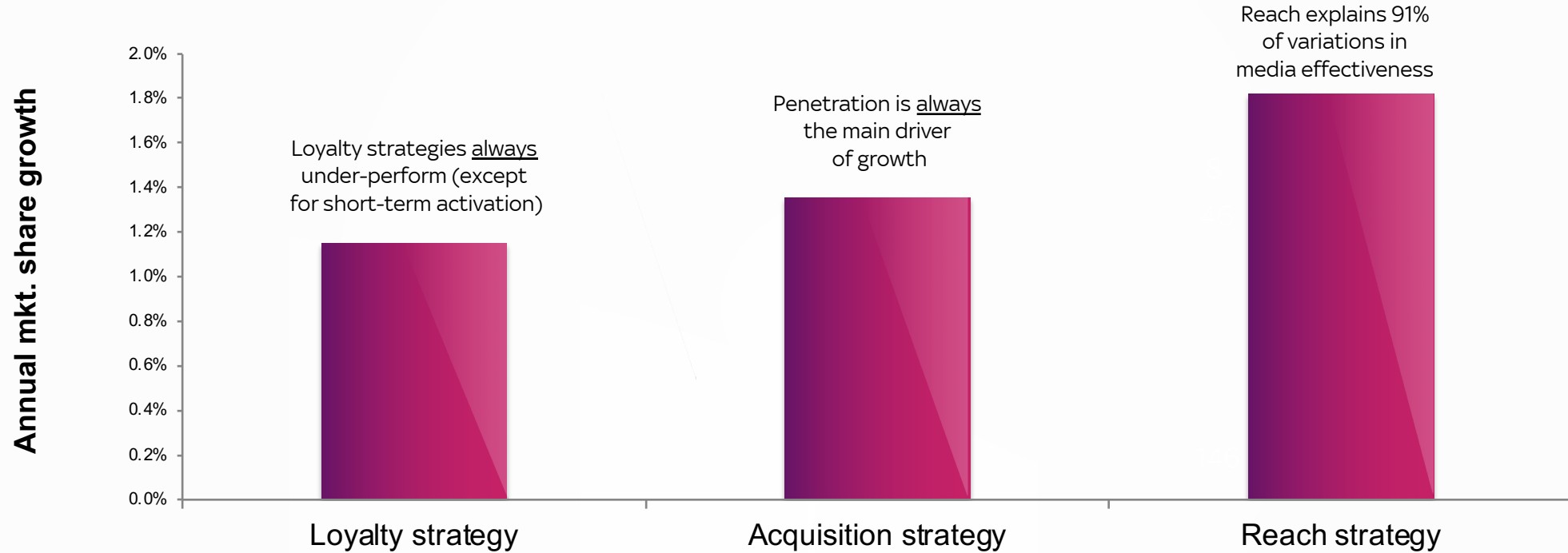
Reach is king



If 80% of your buyers delivered only 20% of your annual sales, it would be tempting to ignore them. But if these light buyers deliver around half your sales, do you still want to ignore them?

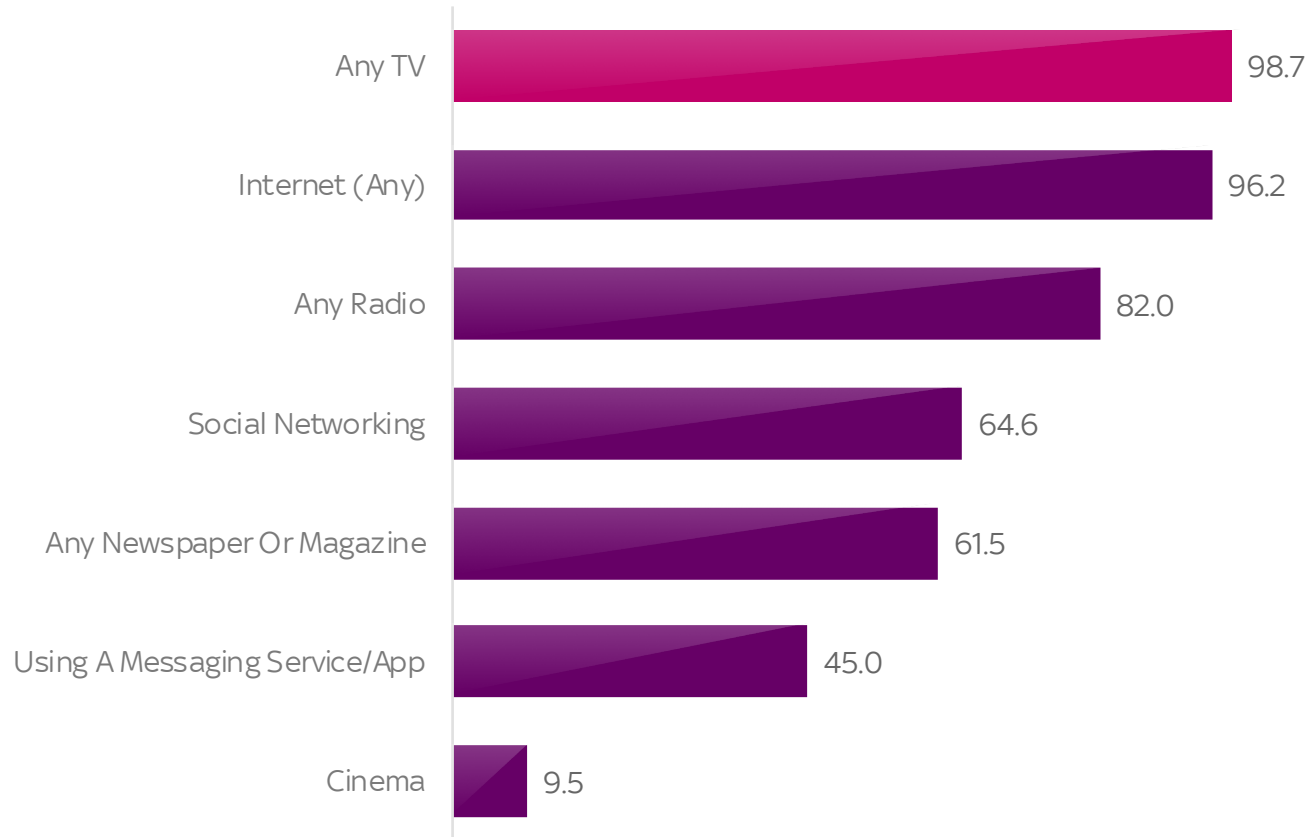
Byron Sharp 'How Brands Grow'

Reach is the most effective strategy for growth



TV reaches the most adults in a week

Weekly Reach by Media %



Source: Touchpoints 2016, IPA. Base: adults 15+. Mon-Sun Reach %



sky cinema

Downsizing

Relevant reach drives higher audience resonance



A P P E A L

+19%

*agree that the advert
appealed to them*



M E S S A G E
R E L E V A N C E

+20%

*agree that the advert was
relevant to them*



A I M E D A T P E O P L E
L I K E M E

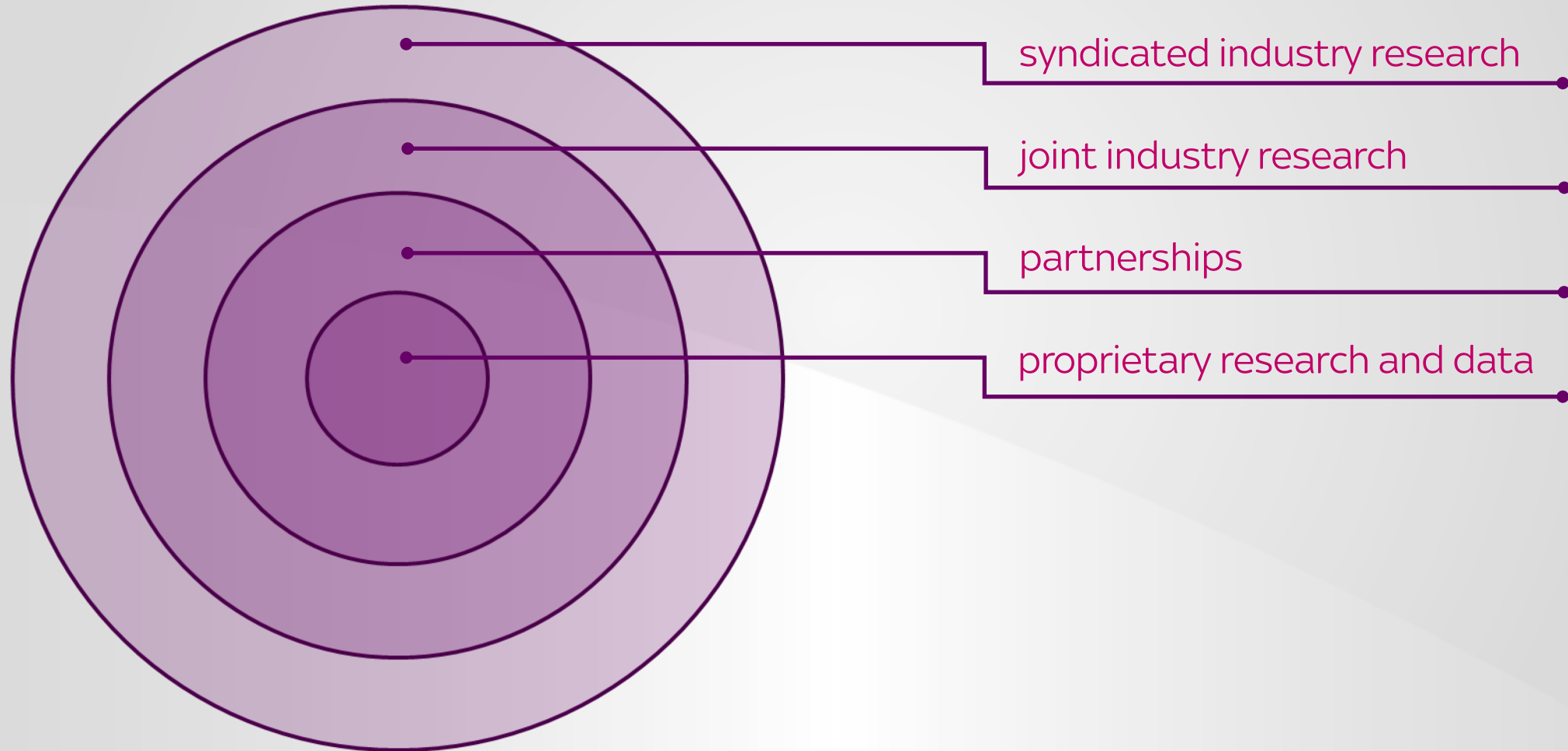
+28%

*agree that the advert is aimed
at people like me*

Where Sky helps to find hard to reach audiences



How do we understand measurement



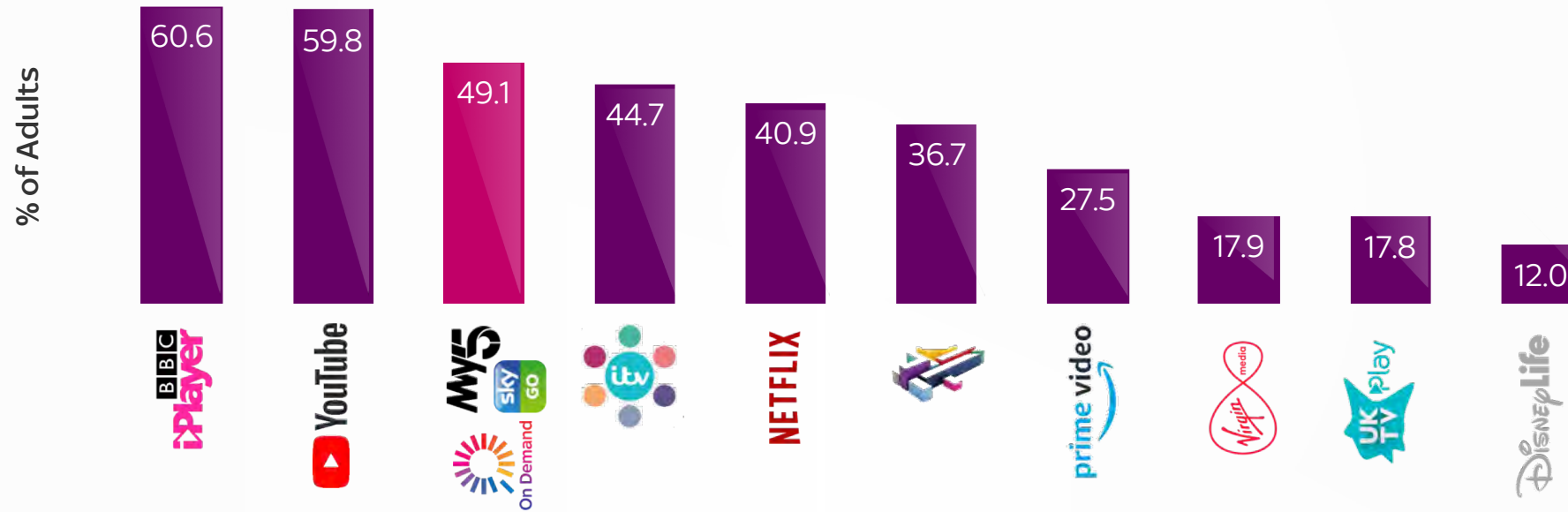
The Landscape Survey



KANTAR MEDIA

sky | MEDIA

Sky Media's On Demand platforms reach nearly 50% of all adults

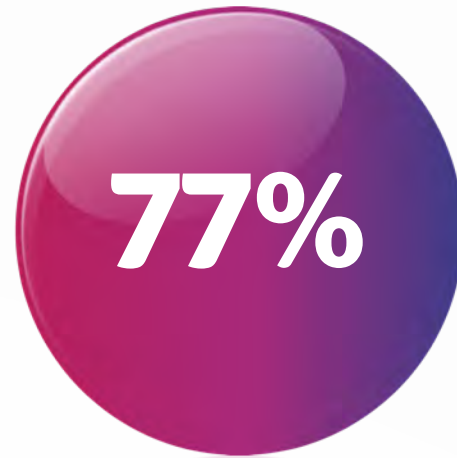


Source: Sky Landscape survey 2018; based on used in the last month all Adults 16+

Sky Media channels have mass reach



daily reach



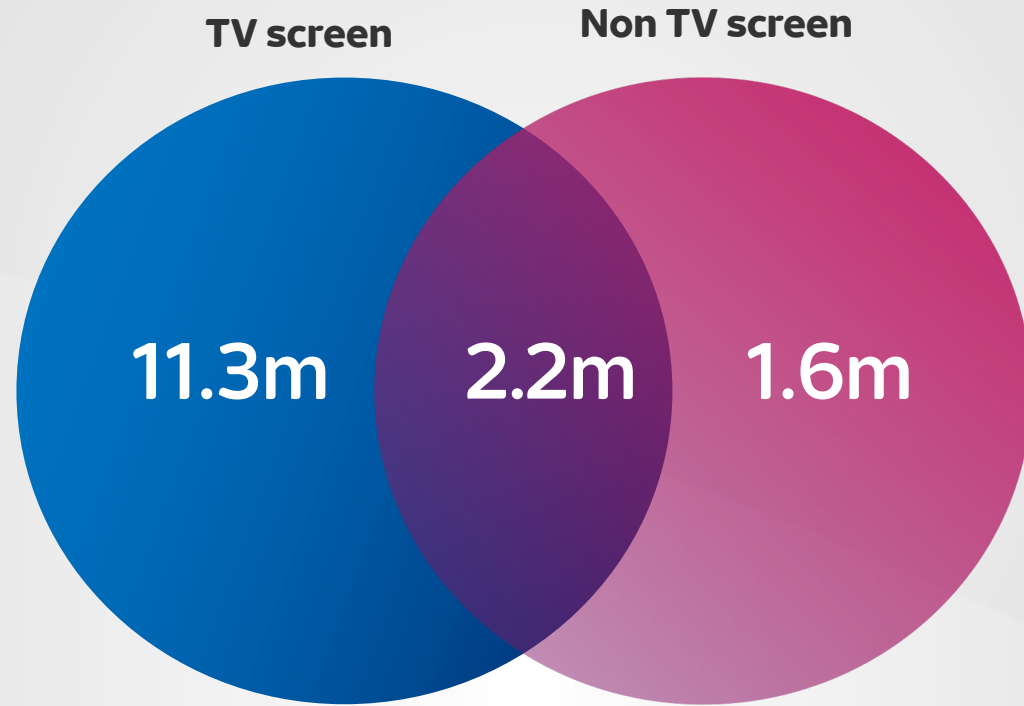
weekly reach



monthly reach

15.1m

watch **sky sports** in a month



e.g. Live, recorded Via set top box
Set top box On Demand
Now Tv via TV screen
Sky Go via games console
Out of Home viewing

Now TV and Sky Go via tablet,
smartphone PC
Sky Sports App Virgin
Anywhere
via non TV device

Watches via TV screen

Watches via a non TV screen





Challenge



HEADS



TAILS

1

**Sky Media can reach two thirds
of 16-34 Adults via linear TV on
an average week**

Heads True or Tails False



True

2

The 7 day consolidated audience for the premiere of the last season of Game of Thrones was bigger than the last season of Love Island

Heads True or Tails False



True

4.7m vs 4.1m

3

Which was the biggest Sky Media partner programme last year amongst Adults 1634?

Heads The Walking Dead on Fox

or

Tails Geordie Shore on MTV



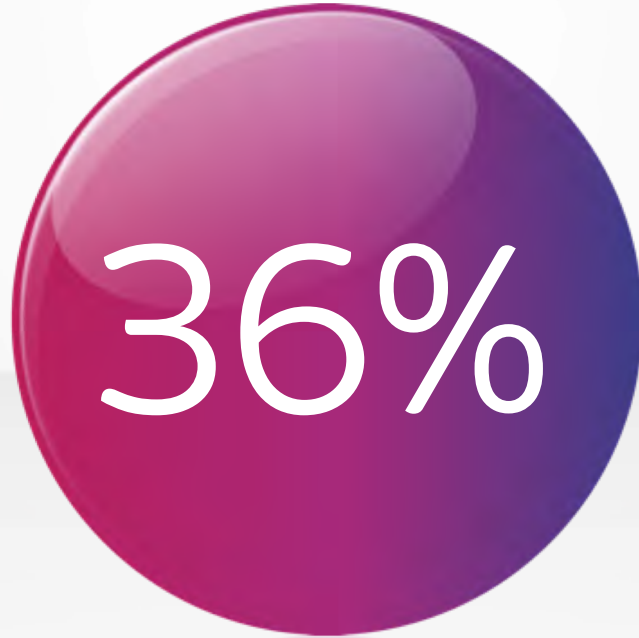
The Walking Dead

The Walking Dead achieved an A1634
audience of 537k vs 480k for Geordie Shore

4

How much extra viewing can out of home (pub, clubs gyms etc) add to the in-home BARB audience of a Liverpool vs Man Utd match?

Heads 36% or Tails 63%



36%

5

On Sky Cinema last year which title had the biggest audience?

Heads Breakfast at Tiffany's or
Tails Breakfast Club



The Breakfast Club

380k vs 209k

6

Last year's Mexican GP achieved an
race average of 1.7 million viewers,
making it the biggest race ever on
Sky Sports F1

Heads true, Tails false



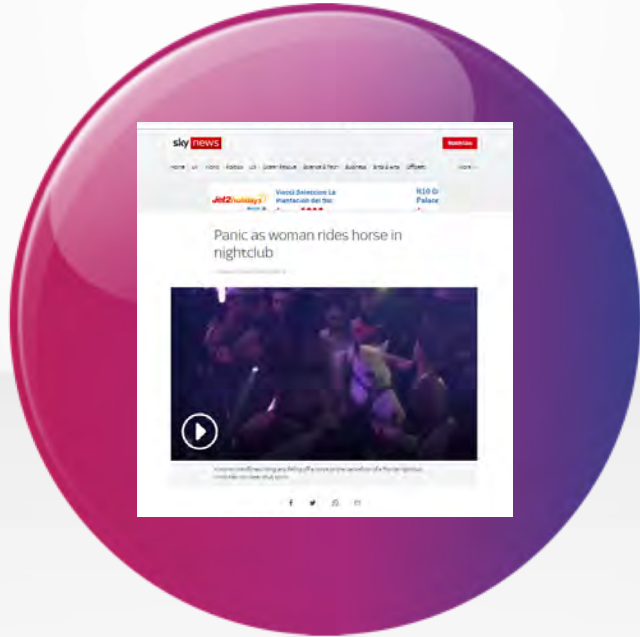
False

A previous Brazilian GP is our best ever

7

Which video had more views on Sky News online last year?

Heads Donald Trump and Kim Jong Un's historic handshake or
Tails a woman riding a horse in a night club?



sky news

Home | News | About Us | Contact Us | Search | Sign In | Register | My Account | My Alerts

World's Biggest LA
Panic as woman rides horse in nightclub

Watch the video

1:00
Panic

Panic as woman rides horse in nightclub

Watch the video

1:00
Panic

Facebook | Twitter | YouTube | LinkedIn

How much Netflix does the average 1634 watch a day?

(according to latest TouchPoints 2018)

Heads 37 mins per day or
Tails 61 mins per day



37'

9

How much broadcast TV did
the average 1634 watch per
day in 2018?

Heads 81 mins or Tails 111 mins
per day



111'

10

Channel 5 has a higher ABC1 Adult profile than More 4 ?

Heads True, Tails False?



Michael Palin in North Korea



They are the same
(based on Oct-Dec 2018 BARB – 44.2%)

An enriched view of our audience



Right
Audience



min 75%



Safe &
Trusted



A photograph of Brad Pitt from the chest up, wearing a white t-shirt, looking off to the side. He is on a boat, with the ocean and a clear blue sky in the background. The text is overlaid on the left side of the image.

Emotion

REACH

Relevance

Engagement

Response

sky cinema

Serenity

Partnerships that drive outcomes



sky one

Jamestown

We leveraged the channel brand to gain maximum exposure



Extension of linear broadcast by VoD

34%
1.8m

sky one

Jamestown

94%
1.2m

sky atlantic

Riviera

22%
5.0m

sky atlantic

Game of Thrones

55%
1.2m

sky atlantic

Tinstar



Big TV Events

sky atlantic

Game of Thrones



BEATS

Socially Active
x-platform



DWP

Pension Considerers
TV Linear



IBM

Business Decision Makers
Digital & Social



STRONGBOW

THE BIG REVEAL

Freshers

MTV
EPISODE 1

RE FRESHERS WEEK

PRESENTED BY STRONGBOW

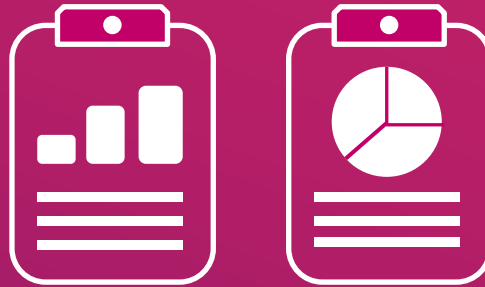
< BEATS VIDEO >

Key Take Outs



INSIGHTS

TV continues to dominate the nation's media consumption



TOOLS

Sky offers a range of data points and tools i.e. Landscape Survey to better understand audience behaviours



INSPIRATION

Sky is home to some of the UK's most inspiring consumer tech and content



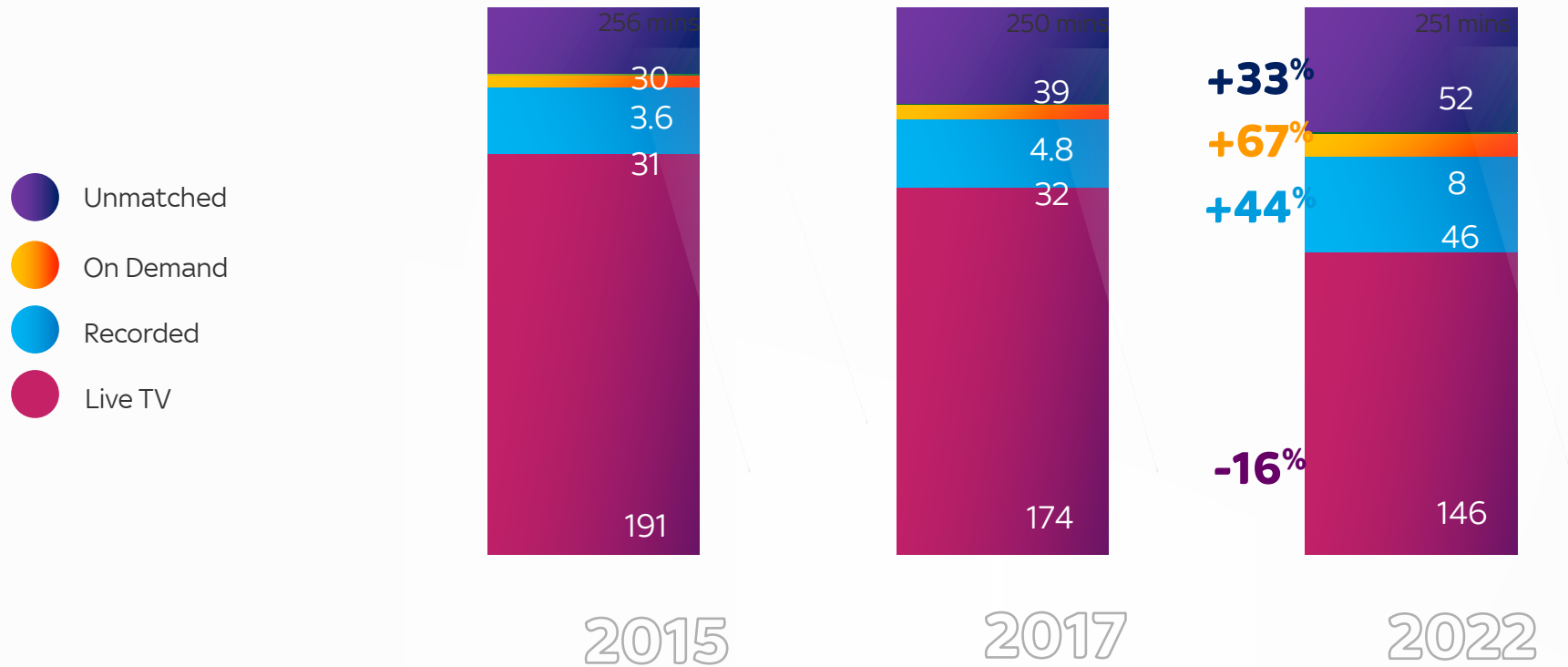
What next?

sky one

A League of their own
European Roadtrip

A measurement challenge in a changing landscape

Sky Inds



Source: BARB All Sky individuals + Sky estimates to outer years (calendar years) / TV Set only

Recorded viewing is VOSDAL + viewing up to 28 days

On Demand is via Sky Box only

2018

Launch of 4 Screen Reporting

Cross-platform campaign Cov+Freq POC



Latest Panel Meter Testing

KANTAR nielsen

PILOT CAPABILITY

Verification Allocation



Virgin AdSmart

PANEL EXPANSION

AGENCY ROADSHOW

Dovetail Ads Planning (interim)

3rd Party Data Processing



Sky Box Sets

Launch



Deployment of latest meter

2020

Cross-platform campaign Cov +Freq

2021

Panel Expansion

2022

LIVE
TV



ON DEMAND
SKY GO



ON DEMAND
TV



LIVE
SKY GO



= **Xm** Reach

Next time we meet



CROSS
PLATFORM
MEASUREMENT



GAME OF
THRONES



CONTENT
DISCOVERY



VOLVO
RESEARCH

