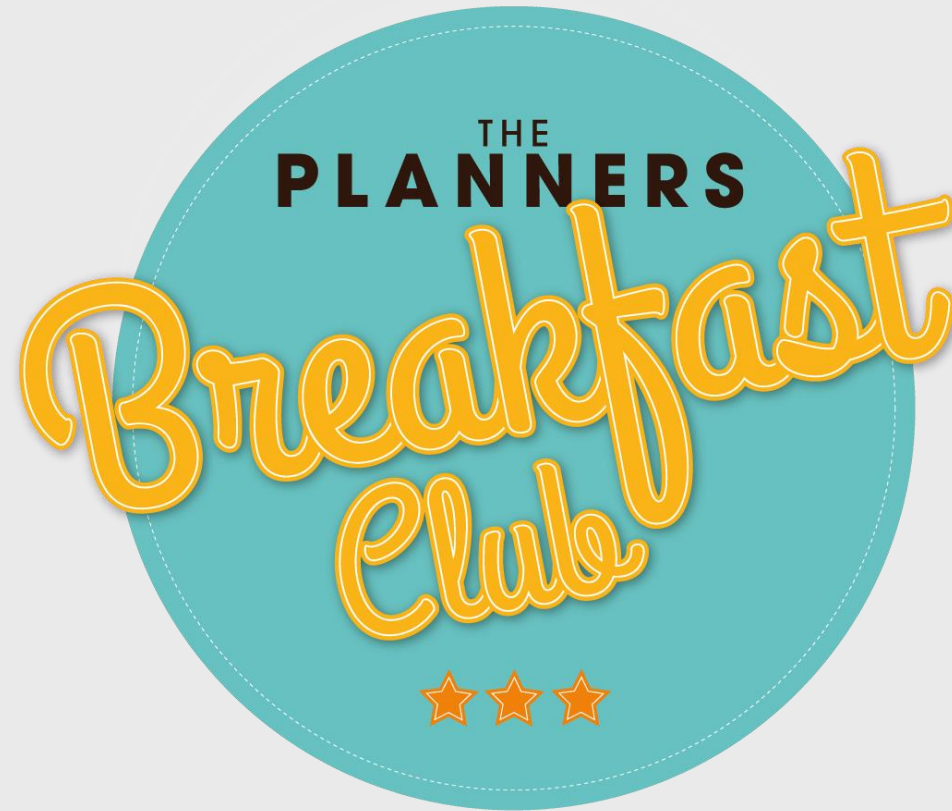


sky | MEDIA



2020



sky | MEDIA



What the Breakfast Club is for...



# Breaking down barriers between TV and digital





# Digital

sky comedy

The Righteous Gemstones

Poor Viewability

Low Cost

Bottom Funnel

Devices

Programmatic Automation

Digital Giants

Data Breaches

Fake News

Challenges to brand safety

FORMATS



A satellite view of Europe at night, showing the continent illuminated by city lights. The lights are concentrated in major urban centers and along coastlines, creating a glowing pattern against the dark landmass. The surrounding oceans are dark, and the curvature of the Earth is visible at the top and bottom edges of the frame.

Sky are thinking about

the **Digital landscape**  
in different terms



# AGENDA

---

## Phil Shade, Head of Digital

- Welcome and introduction

## Francesca McLaven, Digital Sales Controller and Greg Ingram, AV Sales Manager

- Shifting consumption habits and the rise of video
- Quick fire questions

## Claire Speirs, Creative Solutions Controller and Catherine Lui, Head of Social Partnerships

- How to solve brand challenges creatively
- Quick fire questions
- Fireside chat with The Lean Machines

## Our Expert Panel hosted by Neil Kent

- Featuring Jessie Landers from AB InBev, John and Leon from The Lean Machines and Claire Speirs from Sky Media
- Slido Q&A

## Phil Shade, Head of Digital

- Conclusion, key take outs and survey competition

sky cinema

Bumblebee

slido

**Submit your  
questions**

Join at

**slido.com**

**#Z553**

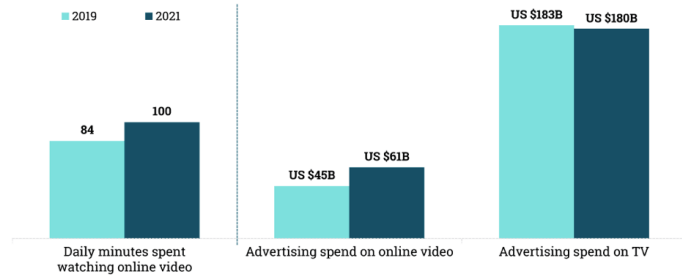
# Shifting consumption habits & the rise of video

Francesca McLaven and Greg Ingram



# Consumption is changing and the appetite for video is growing

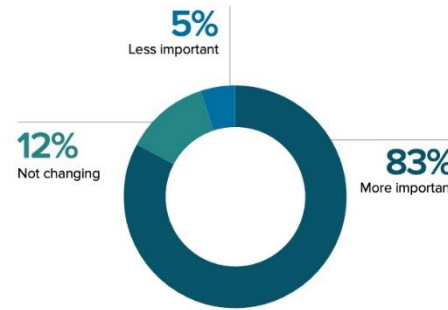
Global Online Video Viewing and Ad Spending Forecast 



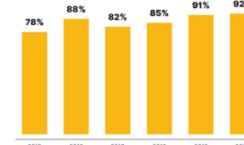
Published on MarketingCharts.com in October 2019 | Data Source: Zenith  
 Based on a Zenith forecast covering 51 key markets. Online video refers to "all video content viewed over an internet connection, including broadcaster-owned platforms such as Hulu, over-the-top subscription services like Netflix, video-sharing sites like YouTube, and videos viewed on social media."

FIGURE 1: THE CHANGING IMPORTANCE OF VIDEO AS MARKETING CONTENT

83% of study participants report that video content is becoming more important.



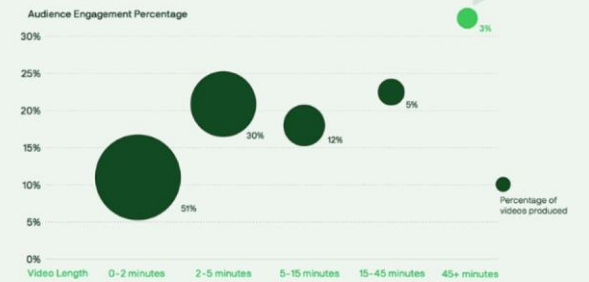
Is video an important part of your marketing strategy?



Source: Wyzowl State of Video Marketing Survey 2020

Videos can last longer than **90** seconds

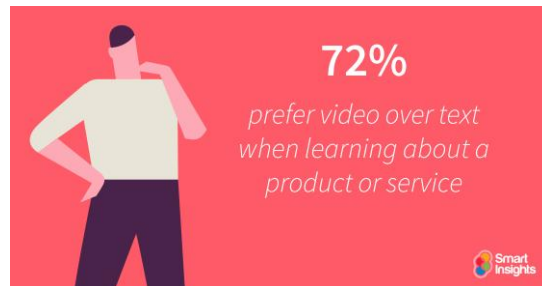
How much time do people spend watching a video?



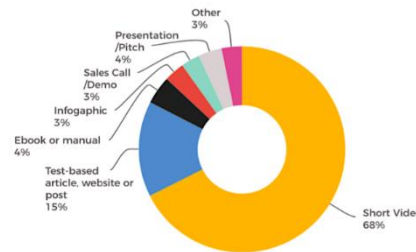
80% of videos produced are under 5 minutes, but these account for less than a third of video engagement. Longer pieces of content engage more but marketers produce shorter videos. Videos longer than 15 minutes account for 50% of all video engagement, but only account for 8% of all video content produced.

SEJ • Digital Advertising

## How Digital Video Advertising Will Dominate the Next Decade



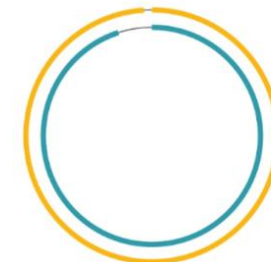
How do you MOST prefer to learn about a new product or service?



People who said their business currently uses video for marketing:

Will you continue to use video in 2020?

How much do you plan to spend on video marketing in 2020 in relation to previous years?



**99%** of current video marketers will continue using video in 2020.

**95%** plan to increase or maintain their spend.

Source: Wyzowl State of Video Marketing Survey 2020



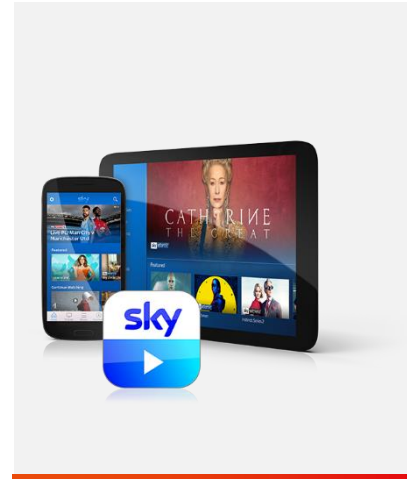
80%

of all internet traffic will be  
**video** by 2021

# Creating digital strategies around this shifting landscape



YouTube



Sky Go Linear



**250<sup>m</sup>**

hours of video consumed  
on YouTube per day

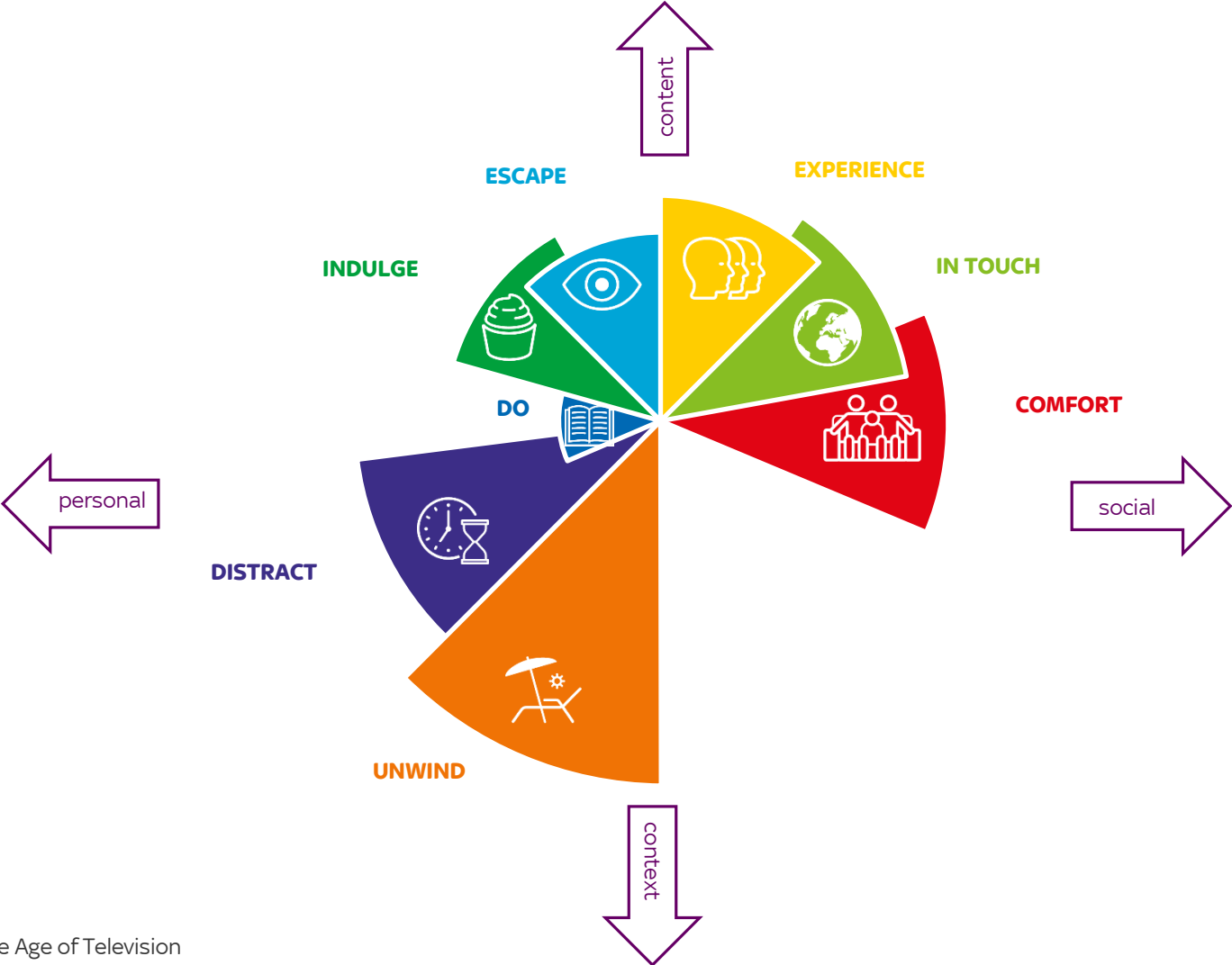
**x2**

16-34s have doubled  
since 2015

**88%**

more time spent consuming video  
online vs other content

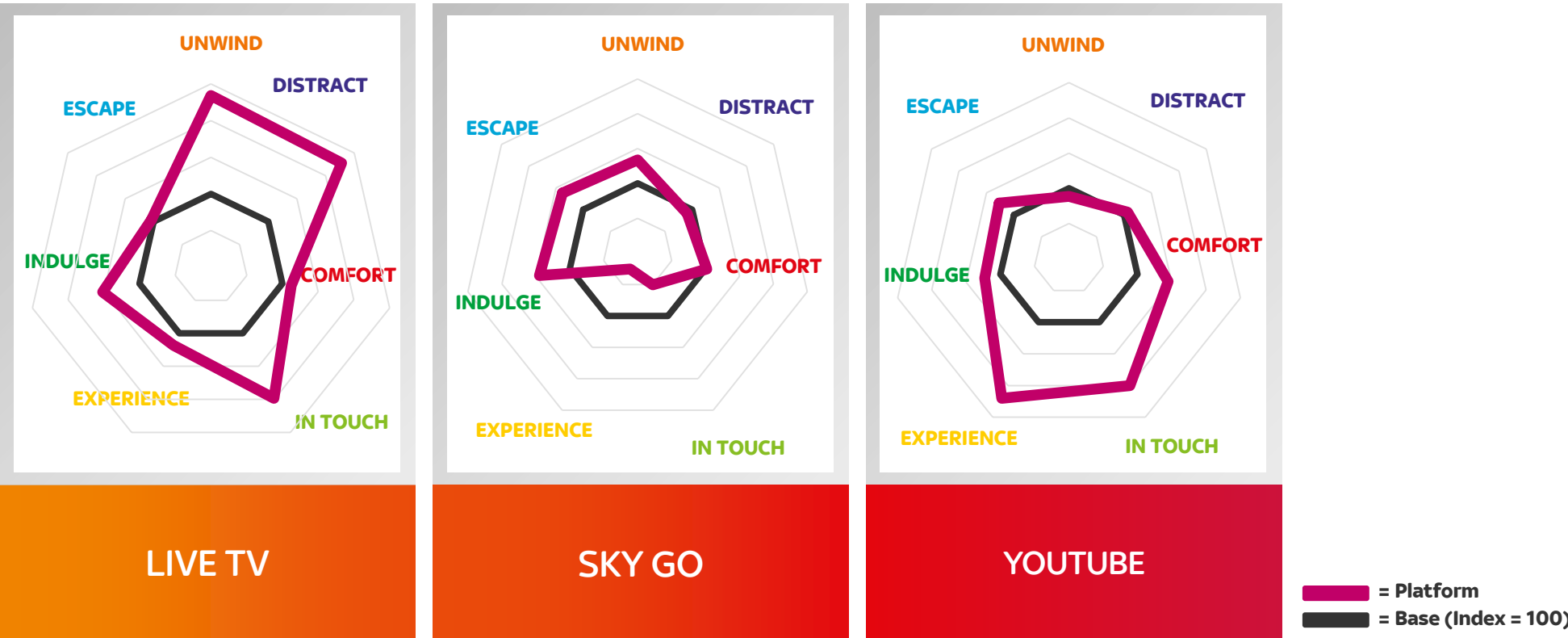
# This video consumption is being driven by 8 key need states



Source: Thinkbox/MTM: The Age of Television

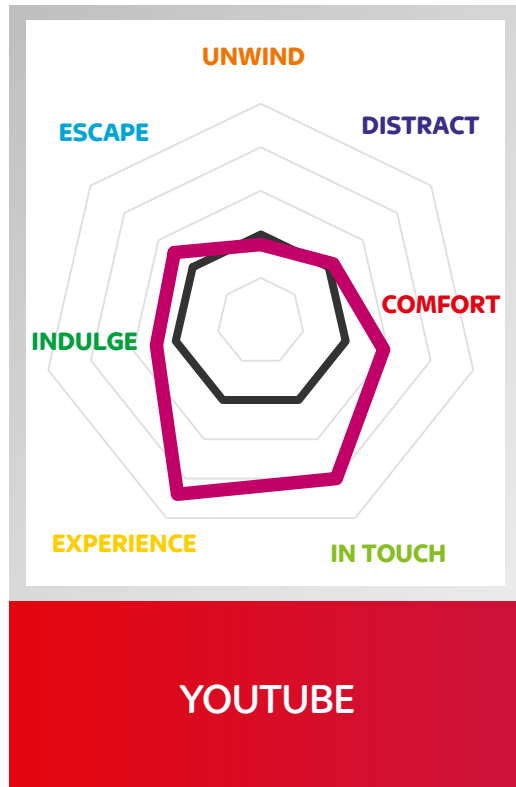


# Covering a broad number of need states across BVOD & digital



Source: Sky Media Landscape Study | Need states by Index | Base = all viewing occasions by need state

## The platforms placement in market is clear...



- On the go
- Bite size
- Snackable
- Immediate
- Involved, don't miss out
- Part of conversation
- Indicative of the 16-34 generation consumption behaviour

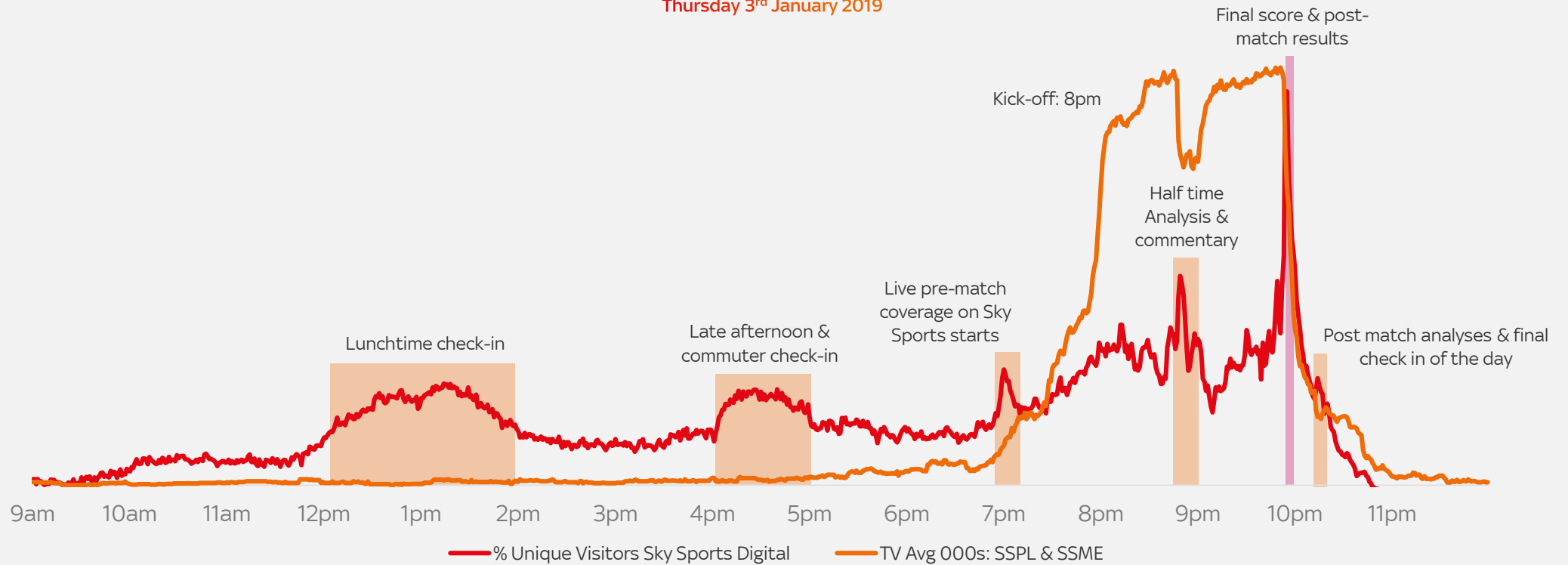
Challenge for publishers is how to make that space premium, brand safe and effective for both consumer and advertiser.



# Live football is a dual platform experience

## Live Premier League: Manchester City v Liverpool

Thursday 3<sup>rd</sup> January 2019



Source: BARB/Techedge/Adobe Analytics

# Incremental Reach



Manchester United  
vs. Liverpool

October 2019



55k



1m



900k



216k



1.1m



# Content designed for platform

PRE



Build up to the live games, pundit predictions, league analysis and player discussions.

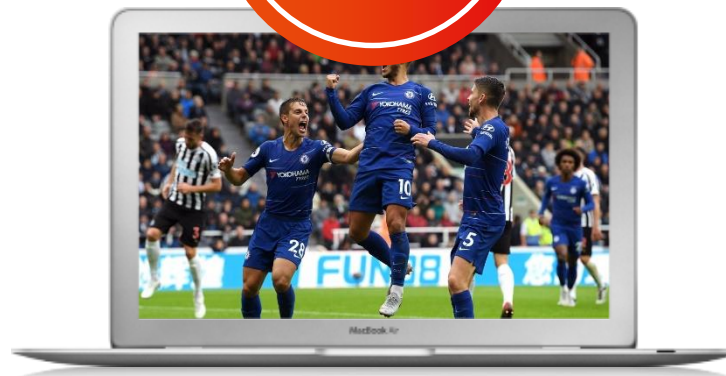
---

Stats previews such as; Goalscorer, Scorecast and Handicaps.

---

Insights and analysis, previewing and predicting results.

HIGHLIGHTS



In-game clips such as great goals, shocking decisions and questionable challenges.

---

Exclusive match-highlights from all 380 PL games, posted within minutes of the full-time whistle ahead of other highlights programmes.

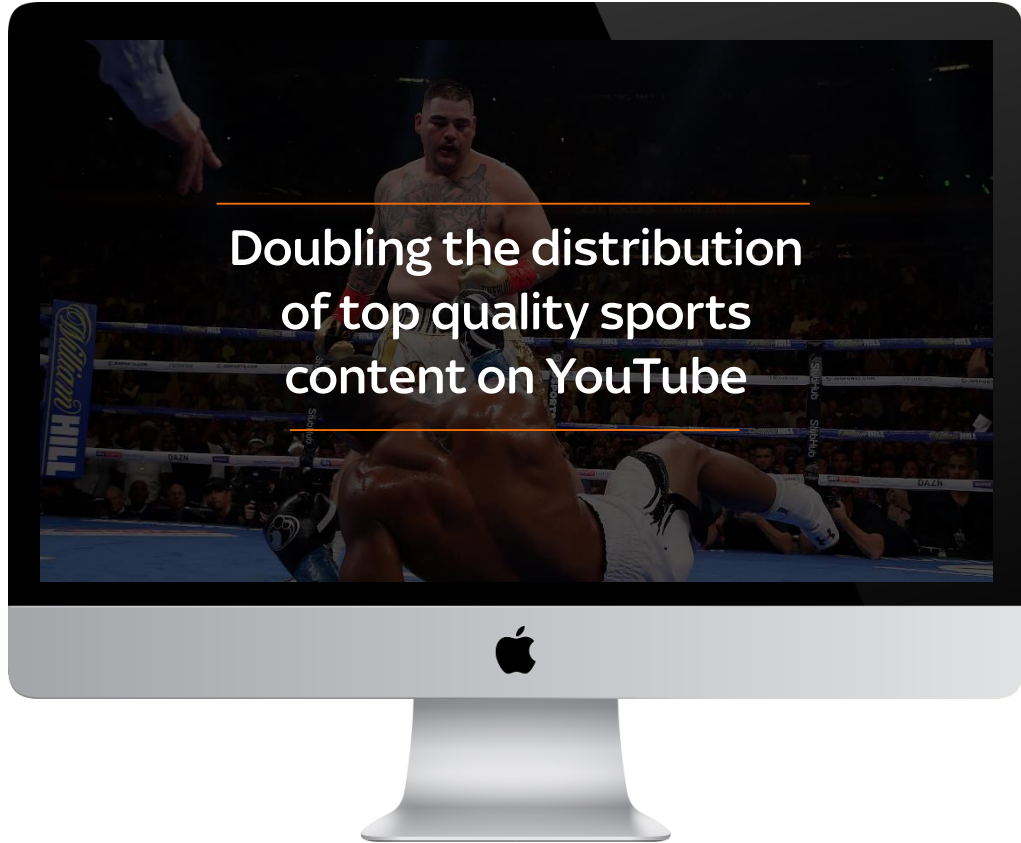
POST



Best goals, saves, funnies and compilation of all the moments that mattered

---

Reaction and analysis from exclusive pundits such as Mourinho, Neville and Carragher.



+10<sup>m</sup>

Views on top performing videos

+80%

Spikes in traffic around key events

4

Dedicated channels;  
Sports, Football, Boxing & F1





# The rise of 6"

Optimized 6-Second Ads  
Encourage Ad Recall



*A 2019 study by comScore found online ads targeted at millennials need to be five to six seconds long to be effective.*

YouTube touts effectiveness  
of six-second ads

**BUSINESS  
INSIDER**

Why Brands and Agencies Are  
Preparing for the Era of 6-Second Ads



DATA & INSIGHTS

**Marketers Think the 6-Second Pre-Roll  
Spot Is the Best Digital Video Ad  
Format**

81% of survey respondents find them effective

Small but mighty: The rise of 6-second ads

**UNRULY**

“

*Six-second ads when combined with 30-second ads as a reinforcement create significant uplift in several important metrics such as engagement, brand recall and purchase intent.*

FreeWheel Council for Premium Video (USA) research.

## Responding to three key issues



47% streaming more  
live video content YOY

---

950k Man Utd v Liverpool

---

PL audiences +39% YOY



Premium broadcast output

---

Viewed by humans

---

Content compliant with  
Ofcom & BCAP codes



Viewability

---

Engagement

---

Effectiveness



Engagement =  
Effectiveness

sky atlantic

Mrs Fletcher

# Broadcaster vs User-generated



ENGAGEMENT

12%

*More engaging*



EMOTION

14%

*More positive emotional environment*



CONTENT

40%

*More premium*



Q14 Have you seen any of this advertising, or something very similar, for Birra Moretti before? Base: Exposed (611) Q3 Assuming you were looking to purchase beer, which brands would you consider buying? Base: All Respondents. Non-Exposed (555), Exposed (611)

# Key take outs

1. Consumption habits & video first
2. High expectations from consumers and advertisers
3. More traditional platforms having to catch up with digital trends
4. Access to hard-to-reach audiences

Any Questions?





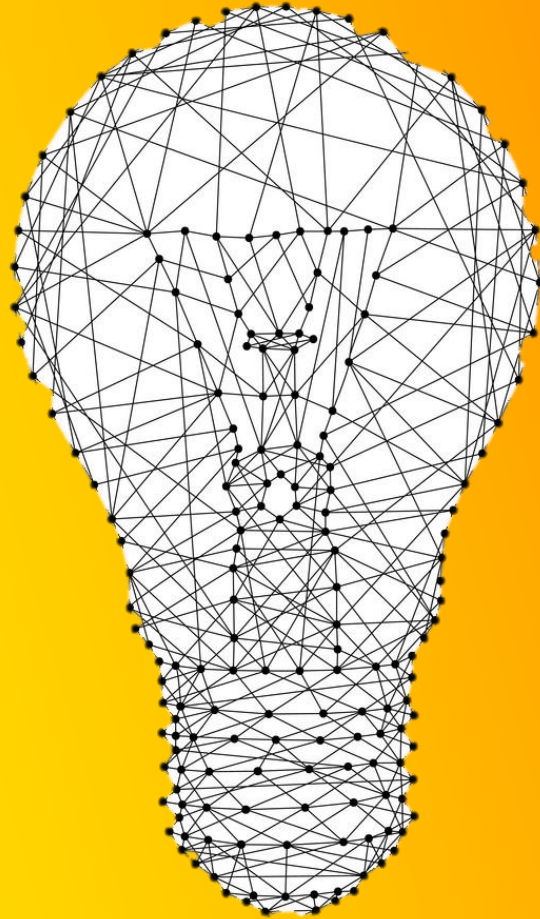
**STRONG**

# How to solve brand challenges creatively

————— Claire Speirs & Catherine Lui —————



# Multiplatform Storytelling



Celebrate  
& accelerate,  
Acceptance  
of women's  
football

FRANCE 2019  
WEEKLY ROUND-UP

PROUDLY SPONSORED BY

VISA



Official partner



# Three clear strategic objectives informed our partnership planning



Proudly celebrate acceptance of women's football in the mainstream; making support for the sport unmissable



Encourage men's football fans to get behind their country by showing how good the game can be



Increase people's familiarity with the inspiring players representing their country in the tournament



Moments  
that **Change**  
the game



# The Rise of Social



sky cinema



“

*We're living at a time when attention is the new currency. Those who insert themselves into as many channels as possible look set to capture the most value.”*

Pete Cashmore, Founder of mashable.com





**Tik Tok**



TV to Social

***Gillette***





**JORGINHO**  
v Watford 2nd Nov

A close-up, low-angle shot of Iron Man's helmeted head and upper torso. He is looking upwards and to the right with a serious expression. The background is a dark, futuristic environment with glowing red and blue light beams. The text "What's the perfect platform?" is overlaid on the left side in white.

What's the  
perfect  
platform?

sky cinema

Avengers:Endgame

# Budweiser X KOTPL

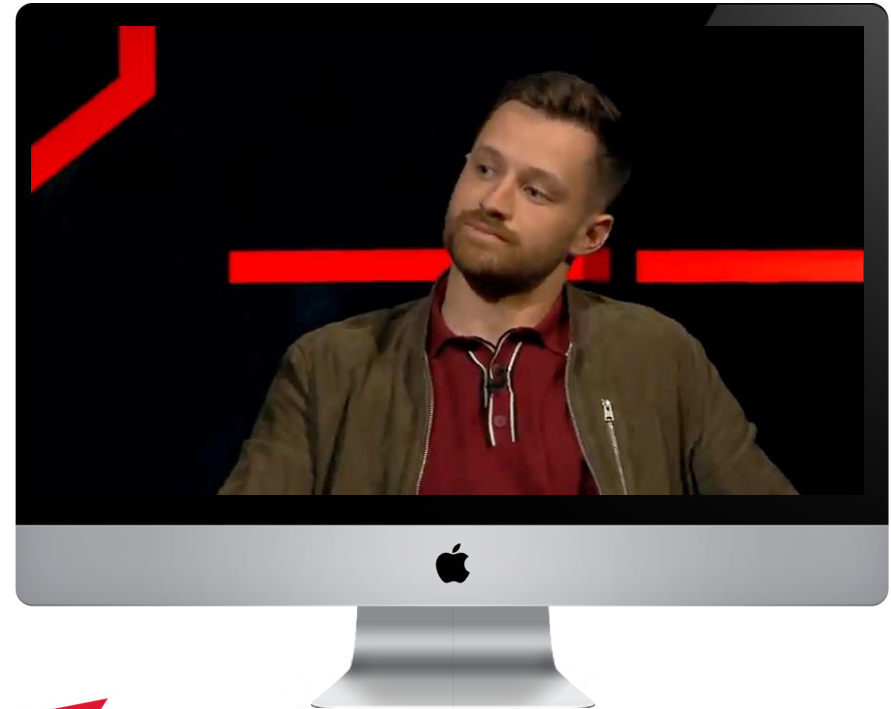
The truth is there is no perfect platform, we create the perfect blend of platforms to fit the idea and audience. Producing bespoke content for each

5 x 30 mins shows

5 x YT shows

Clips per show

Native Articles



VIEWS: **1.2m**  
ENGAGEMENT: **57k**





# Organic Versus Paid Views

sky one

A League of Their Own

# EA Sports FIFA 20 X Saturday Social



VIDEOS: 5.06m



1.09m



1.09m

ENGAGEMENT: 108k

239k

21k





---

# Our Special Guests

---

The Lean Machines: John and Leon





When TV met social talent on  
—— *The Apprentice* ——



# Key take outs

1. Join the dots and drive new connections
2. Invite, don't interrupt
3. Focus on community and culture over eyeballs and numbers
4. Authenticity: Trust editorial and talent with your brand



Any Questions?

---

# Our Expert Panel

---

Hosted by Neil Kent



slido

**Submit your  
questions**

Join at

**slido.com**

**#Z553**

slido

# Our Expert's Example

Jessie Landers



Join at  
**slido.com**  
**#Z553**





# *Beer of Kings*

slido

**Submit your  
questions**

Join at

**slido.com**

**#Z553**

# Closing thoughts & key take outs

Phil Shade



## Wrap up of key take outs

1. Consumption habits & video first
2. High expectations from consumers and advertisers
3. More traditional platforms having to catch up with digital trends
4. Access to hard-to-reach audiences
5. Join the dots and drive new connections
6. Invite, don't interrupt
7. Focus on community and culture over eyeballs and numbers
8. Authenticity: Trust editorial and talent with your brand

Introducing  
**Sky Soundbox**

Reimagining sound for television.



slido

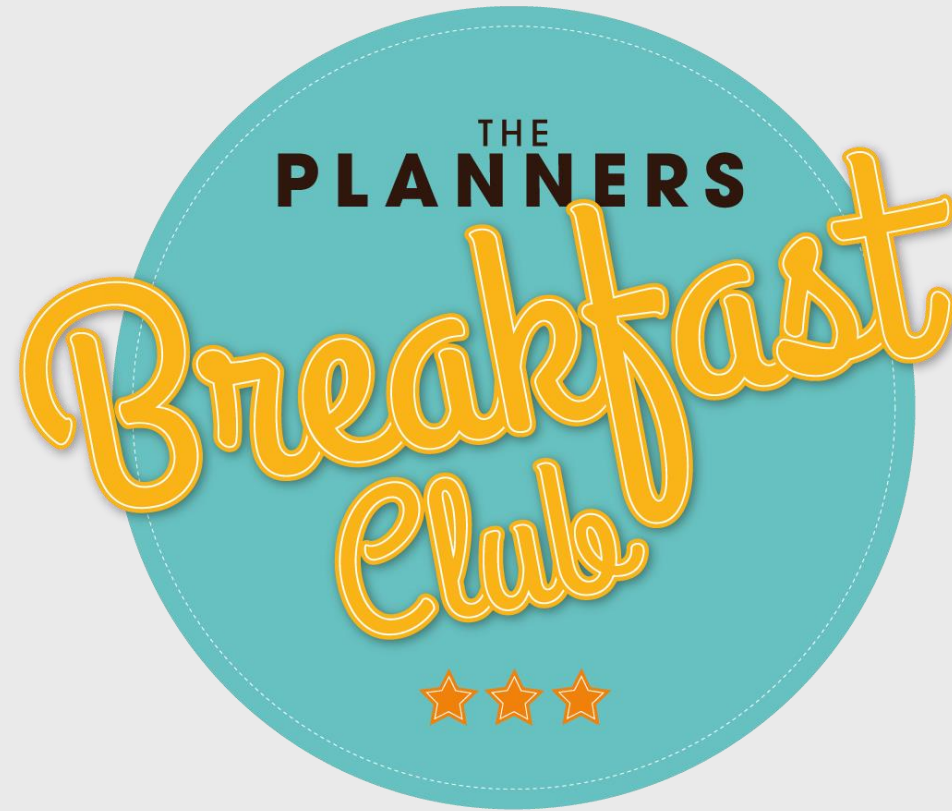
**Tell us what you would like us to  
STOP, START, CONTINUE**

Join at

**slido.com**

**#Z553**

Thank you!



sky | MEDIA

slido

**Tell us what you would like us to  
STOP, START, CONTINUE**

Join at

**slido.com**

**#Z553**





sky comedy

sky  TV