

23 insights from 2023

Hosted by Sarah Jones

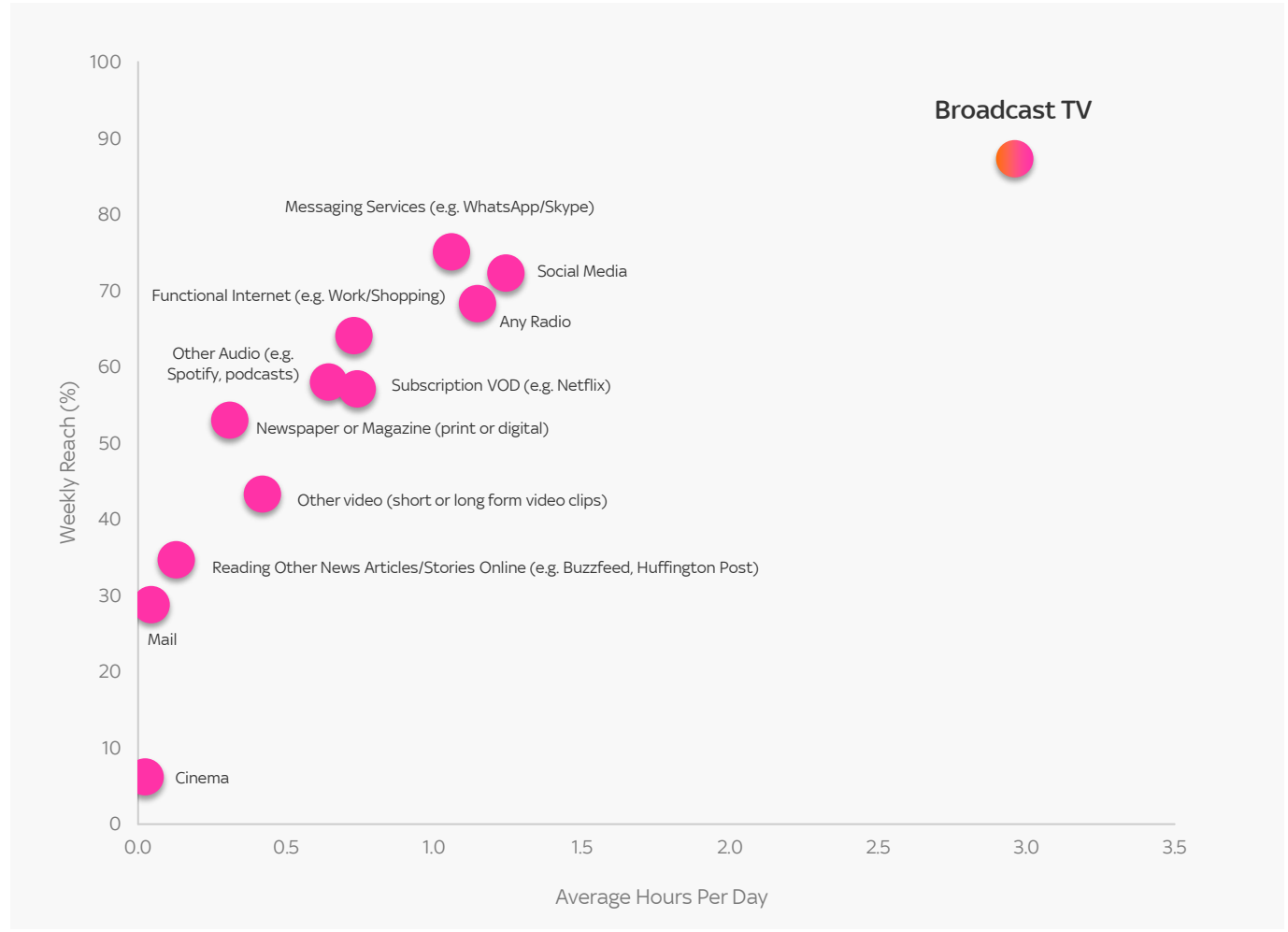
THE Breakfast Club



TV is as important as ever

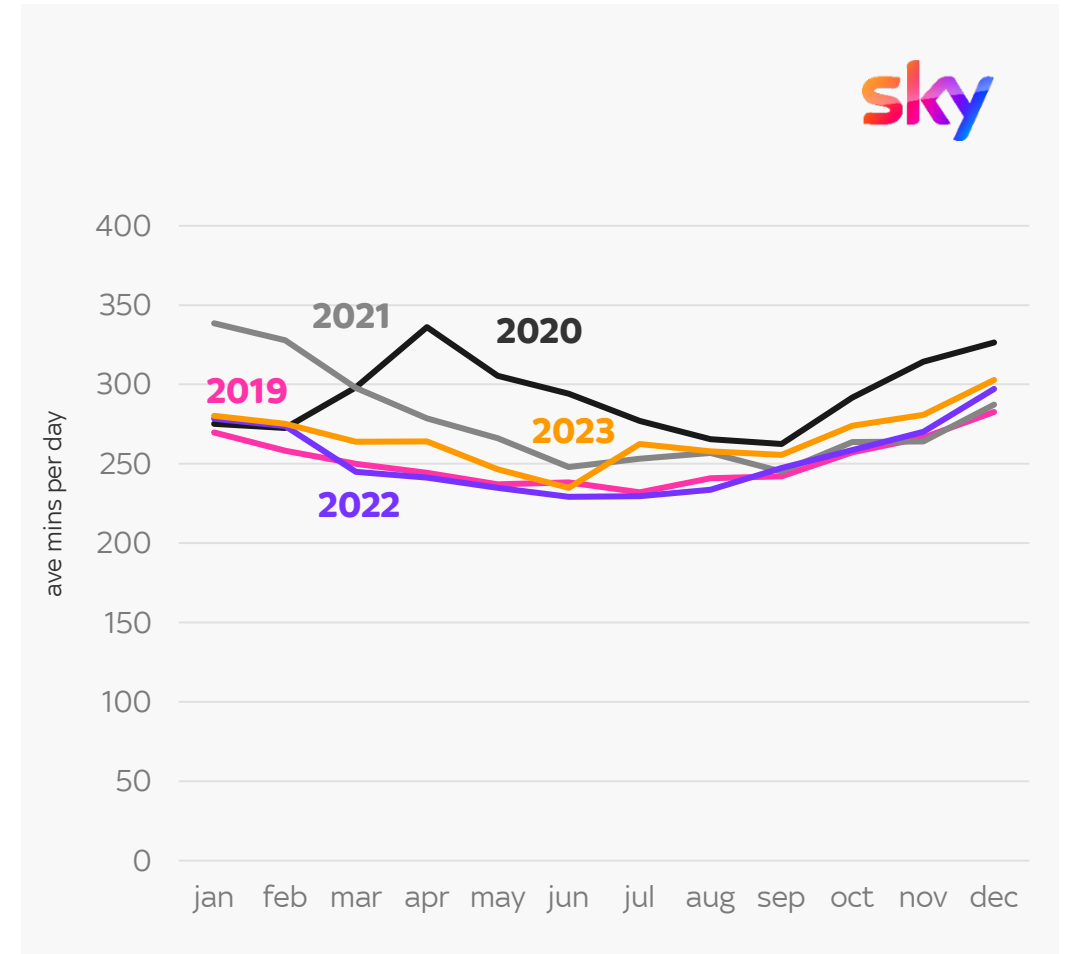
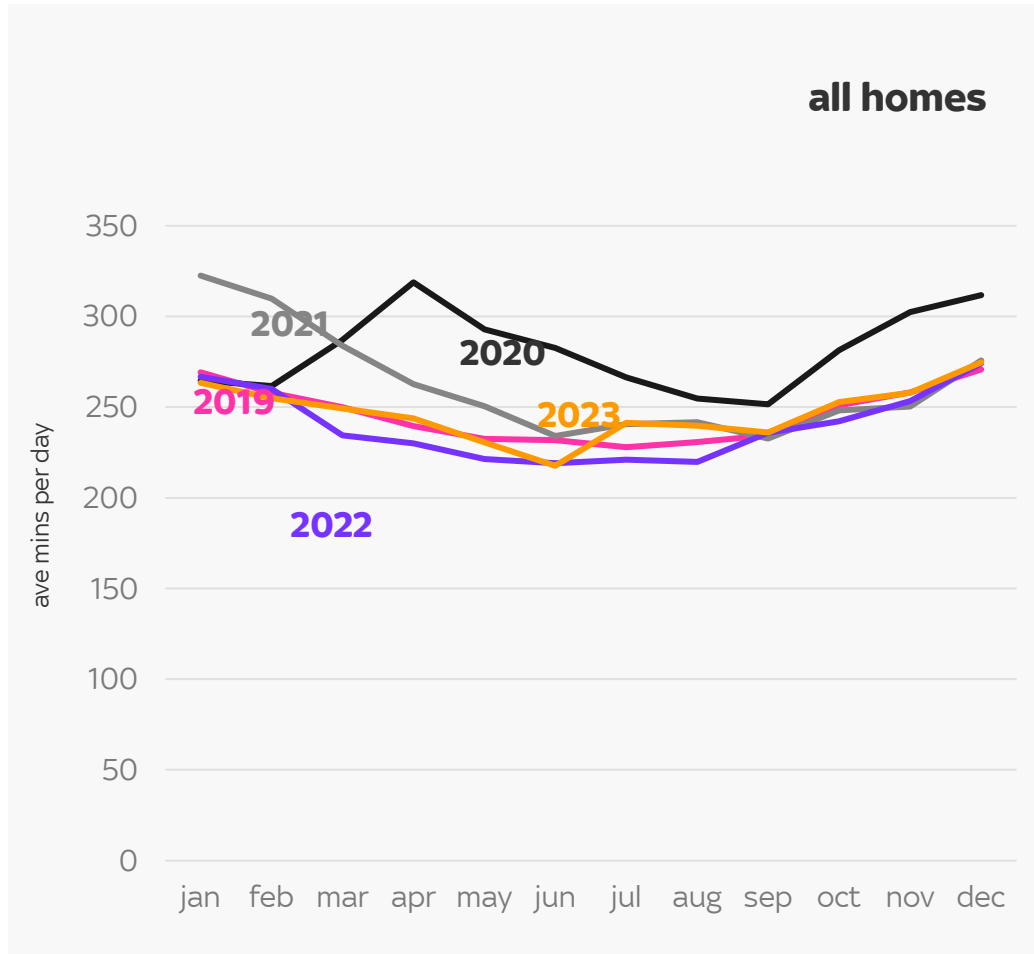


1. Broadcast TV continues to deliver more reach & viewing time than any other media

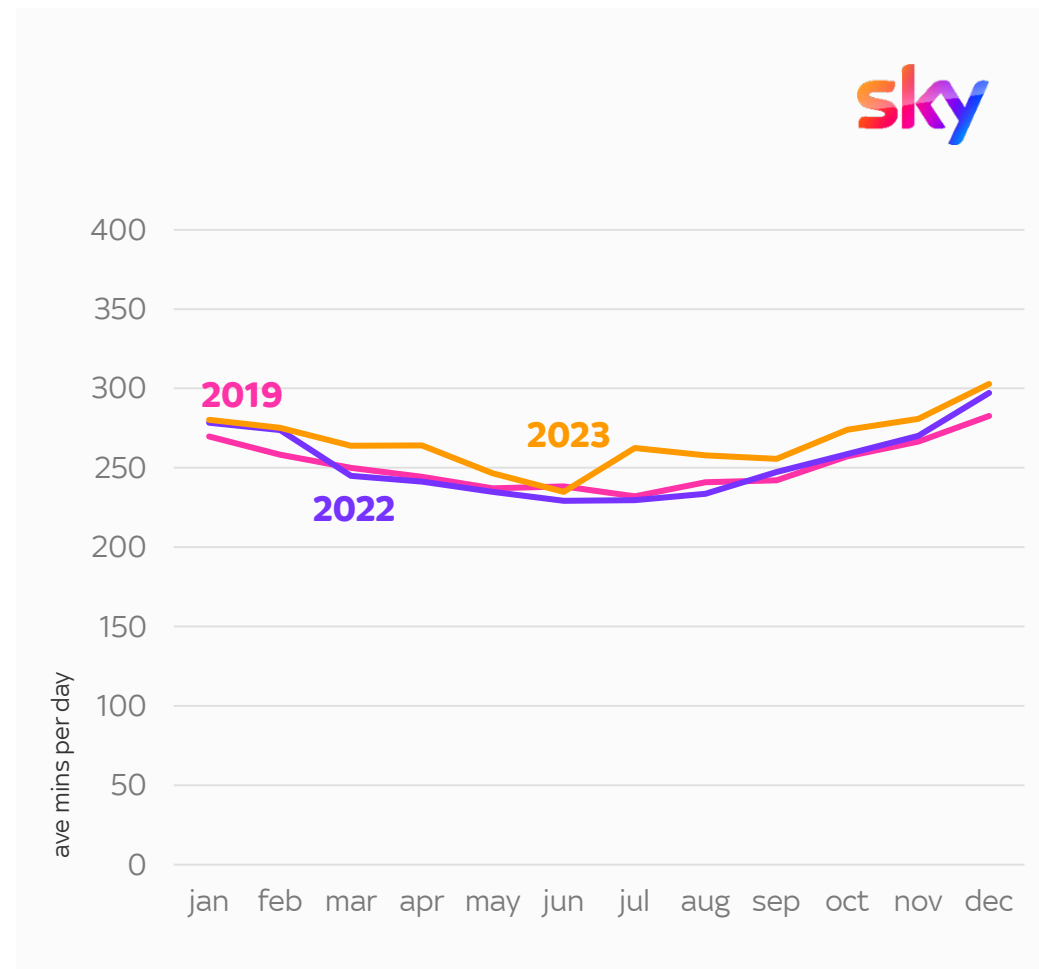
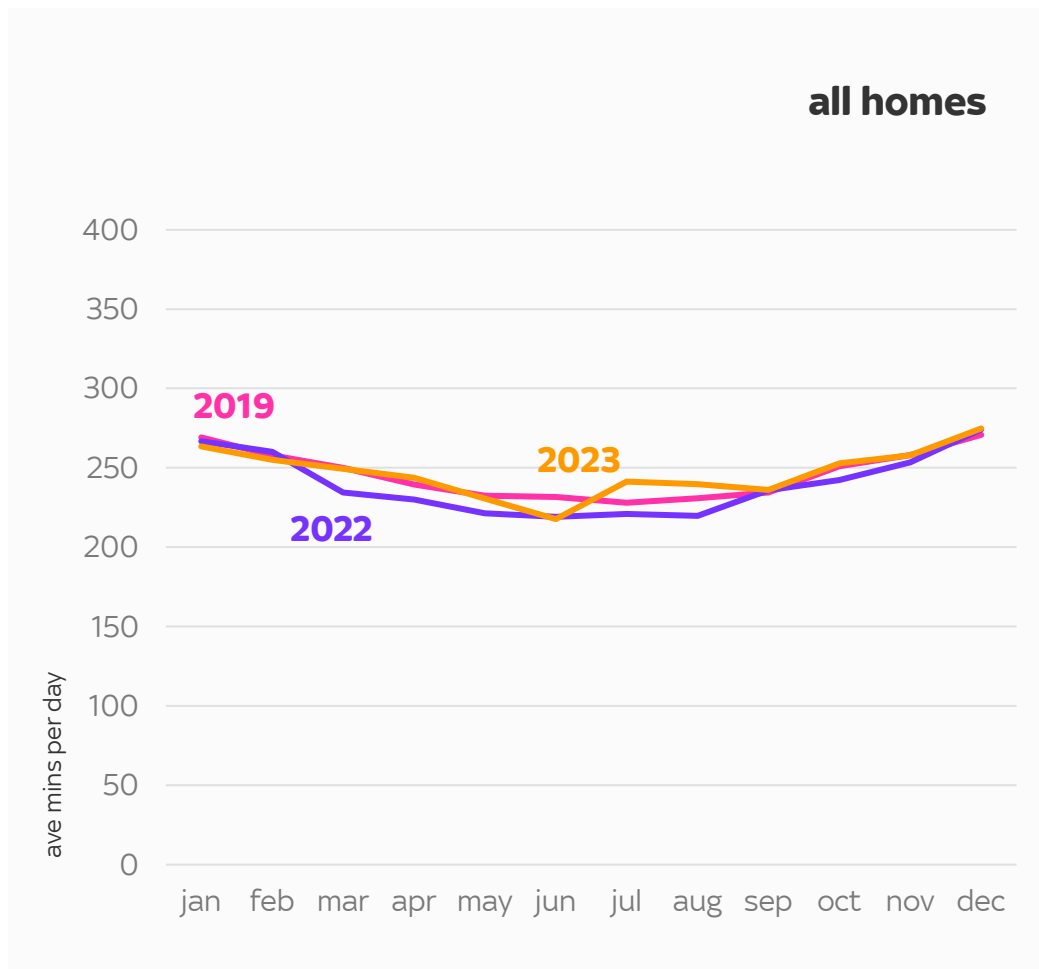


Source: Touchpoints 2023; Media Summary: Reach vs Ave. hrs per day (all); Adults 15+;; Any TV = linear, recorded, BVOD; Other video = long and short form video (including YouTube) -out of home excluded not measured by TouchPoints in the same way as other mediums | Comparison vs 2019

2. Aside from lockdown, viewing remains stable



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Source: BARB Timeshift version /Techedge; All Individuals total identified viewing on the TV Set, all inds and Sky Inds

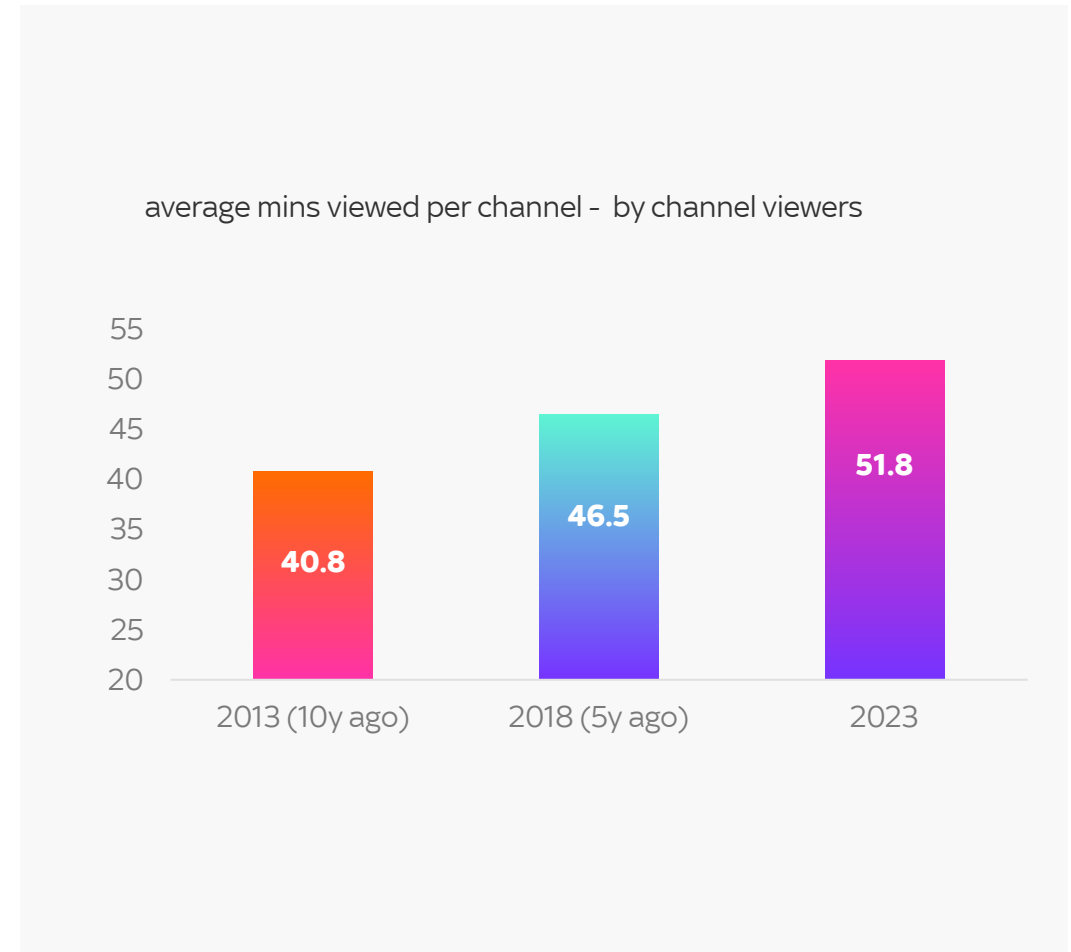
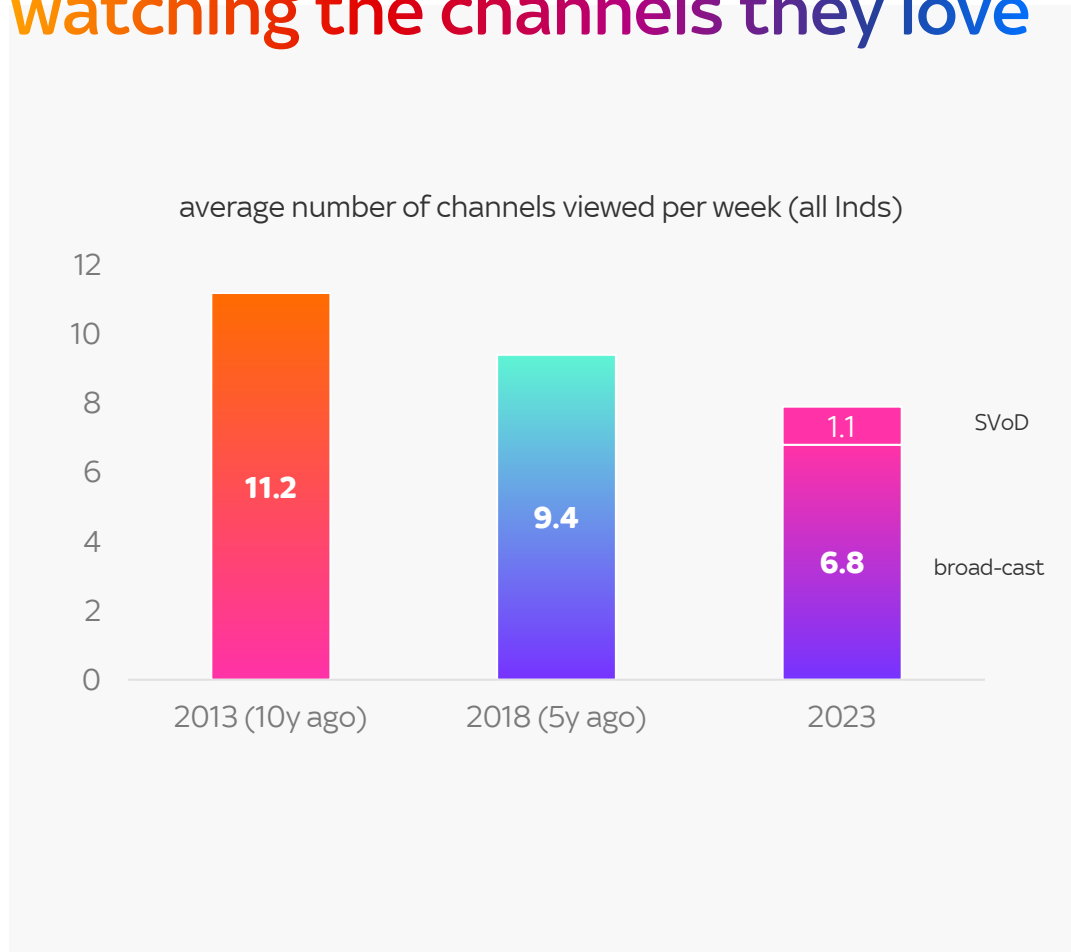
3. The quality of the viewing experience is better than ever



Source: average screen size based on Barb ES (based on main living room set), smart TV penetration based on Ofcom, Communications Market Report 2023, market, UHD based on Ofcom technology tracker (no data for prior years).

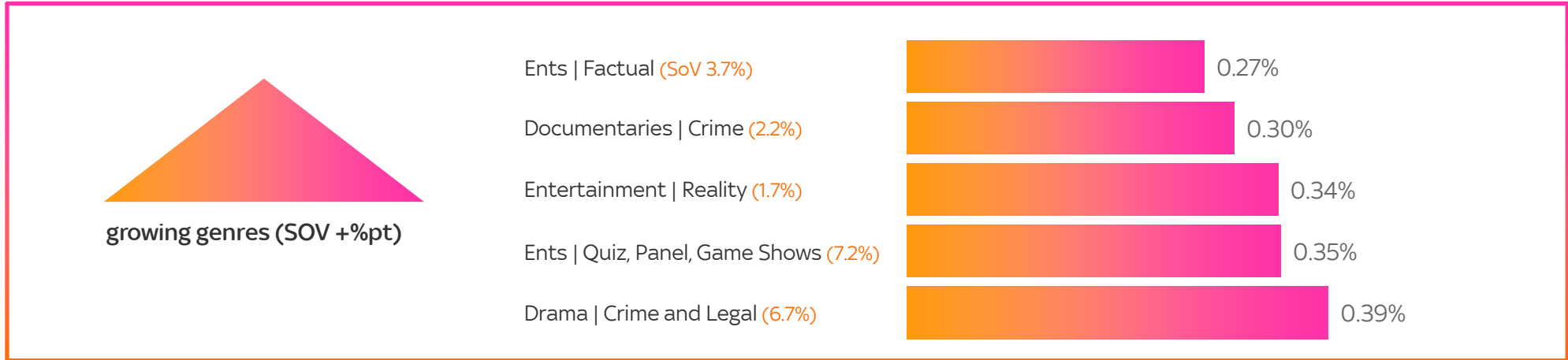
What we're watching

4. Repertoire has declined, but people are spending more time watching the channels they love

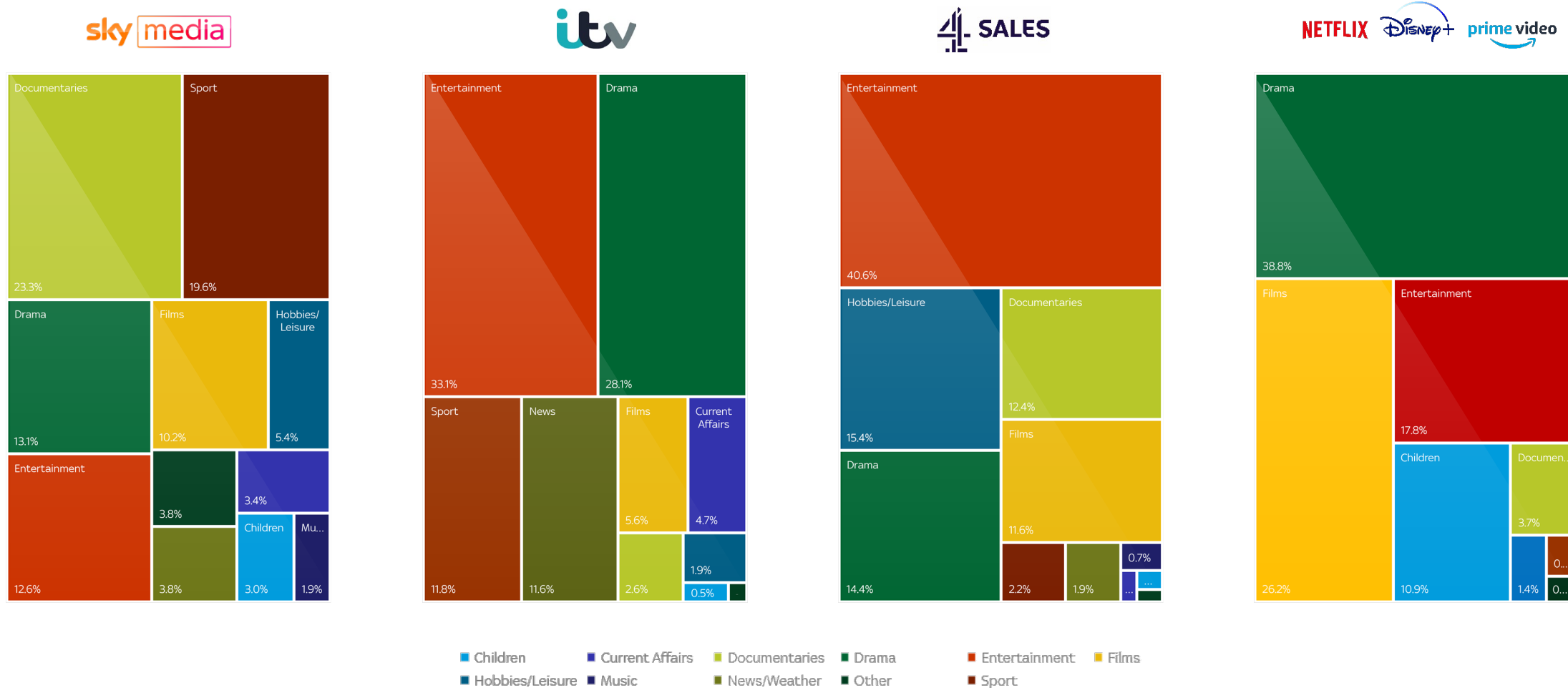


Source: Barb / TechEdge (standard version) , reach based on 3+ mins viewed , all Inds - pre 2013 and 2015 data is broadcasts only
2023 data includes non-linear channels and SVoD based on Barb / Tech Edge as viewed version

5. Drama, Factual and Entertainment are increasingly popular



6. Sky Media has the most diverse content repertoire



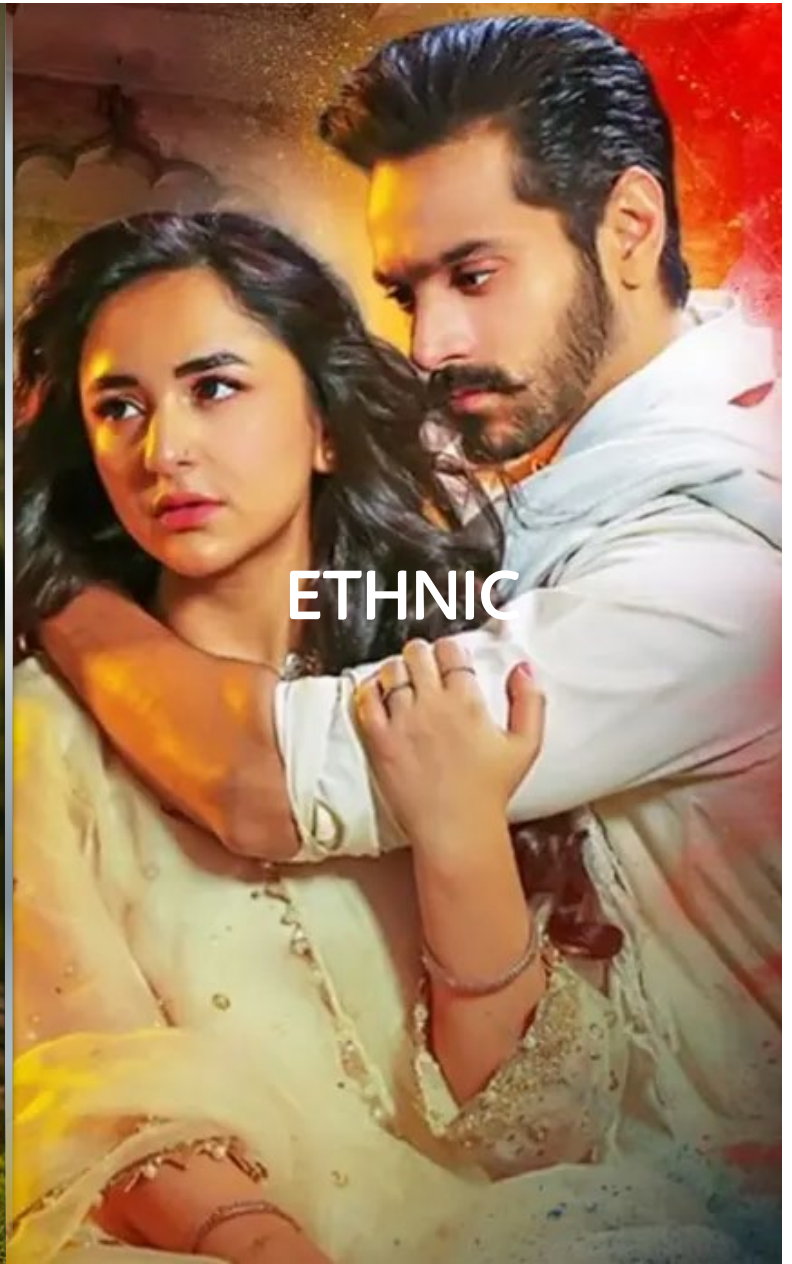
Source: BARB/Techedge; As-viewed module (online multiple screens network); Individuals aged 4+; TV genres based on CCIDS genre classifications in BARB; Other includes Arts, TV Films & Other; Sales house as per October 2023 channel representation; Based on Average minutes (sum) all; Last 12 months to September 2023



CHANNEL 5



KIDS



ETHNIC

7. Transformation of Channel 5

+5%

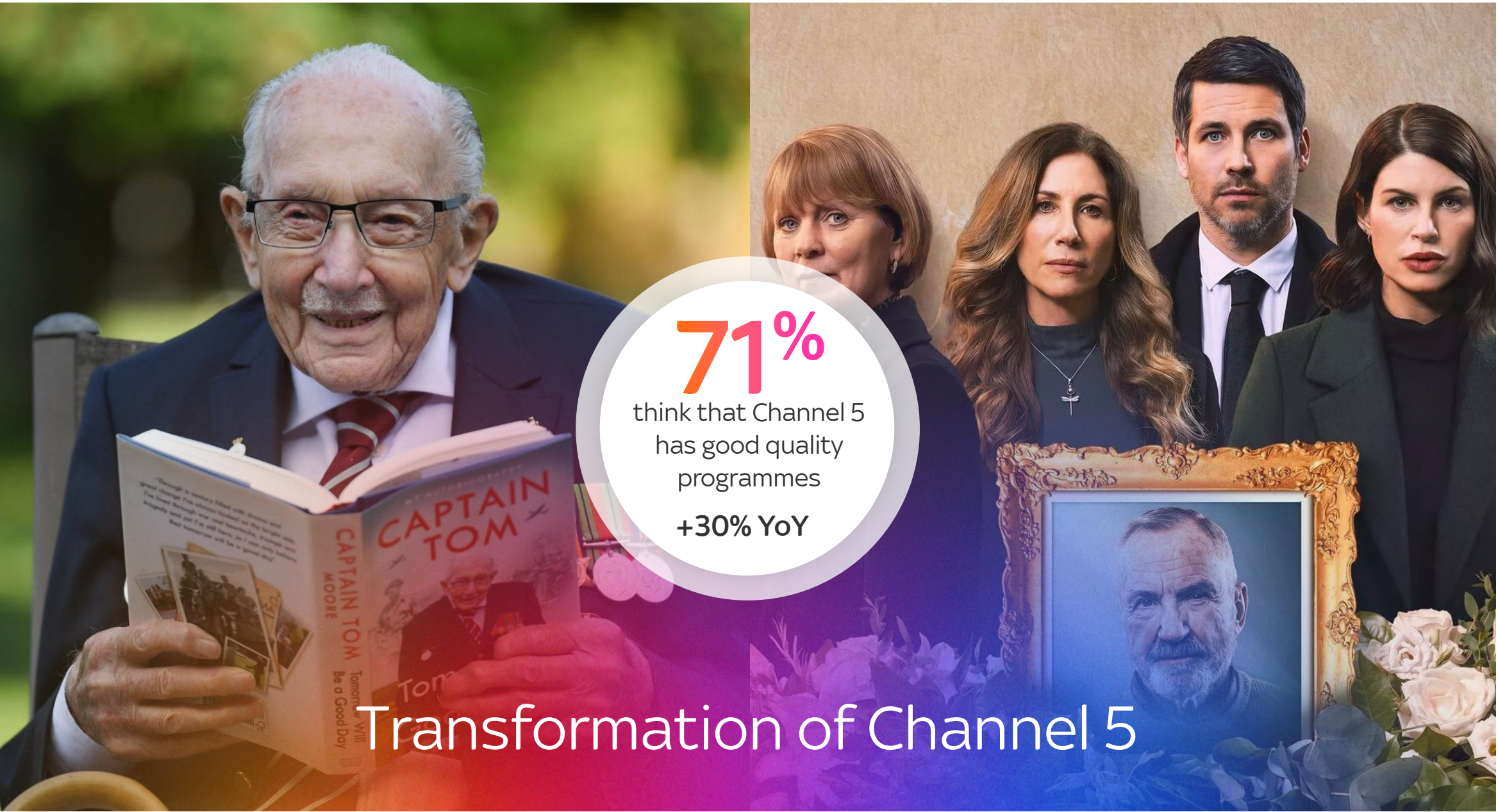
C5 portfolio share growth

+4%

YoY ABC1 share increase across peak
(7-11pm)

+5%

My5 viewing minutes YoY
increase



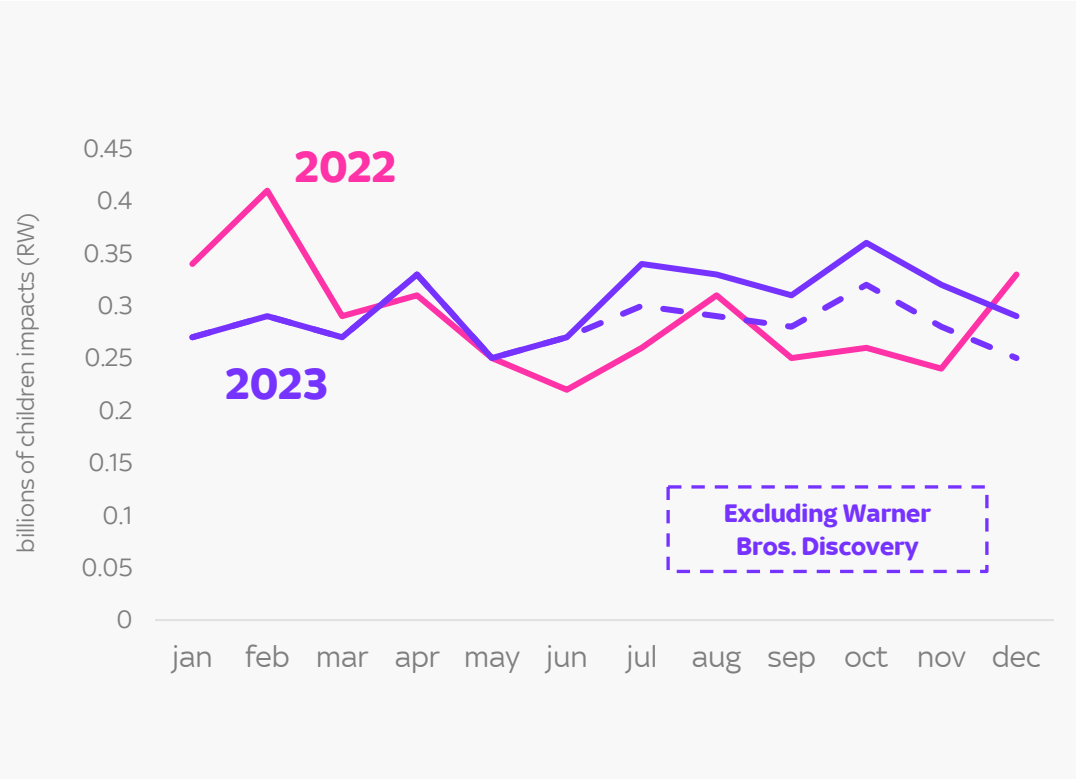
71%

think that Channel 5
has good quality
programmes

+30% YoY

Transformation of Channel 5

8. Our Kids' impacts are up in 2023



Source: BARB / Tech Edge based on RW impacts

+5%
Sky Media Impacts
2023

The AMAZING WORLD OF GUMBALL
CN
CARTOON NETWORK

5

Grandparents

55

House Persons

43

Mothers

12

AB Adults

20

Dads

37

Full-time Workers

63

Parents

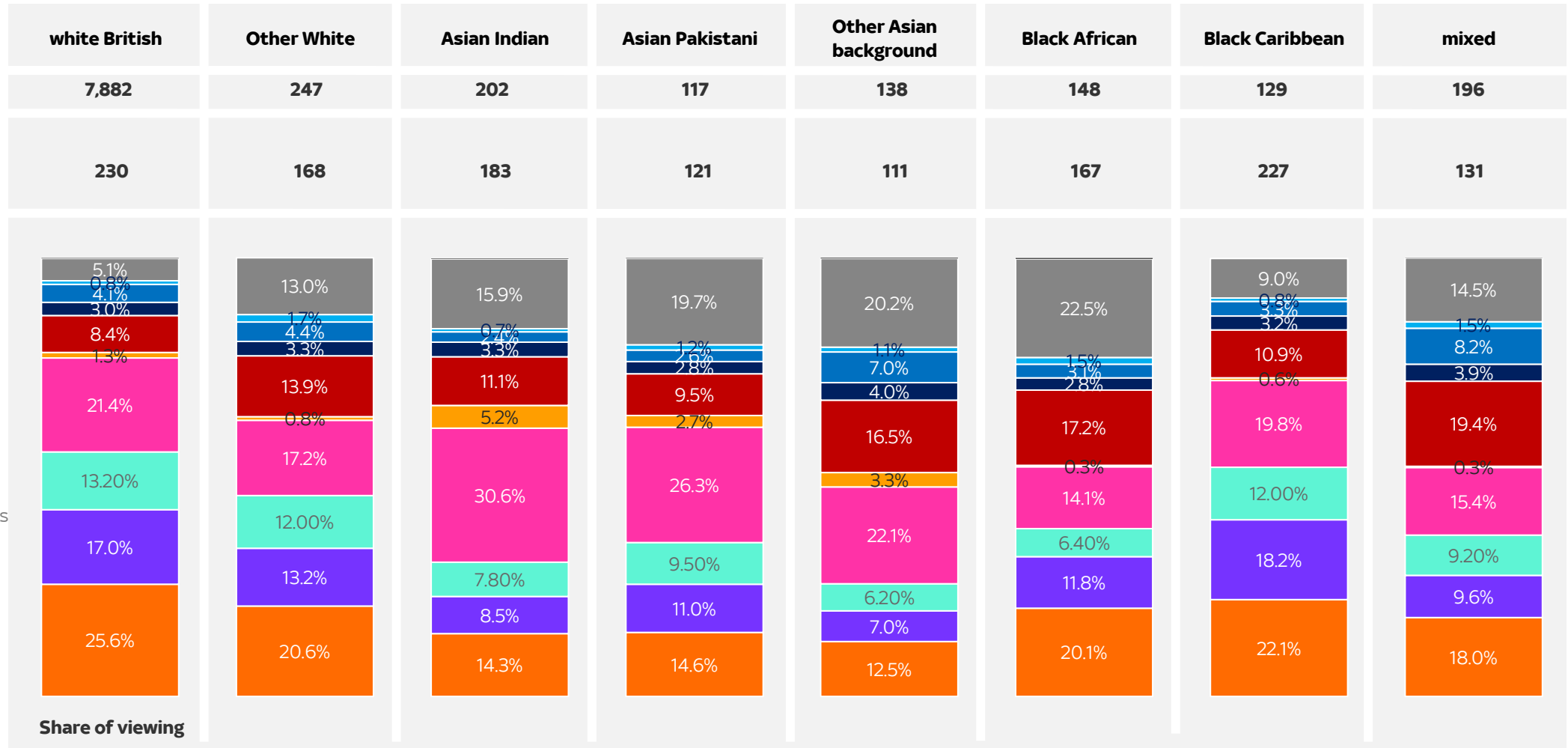
28

ABC1 Adults

9. For every 100 kids impacts - you also get...

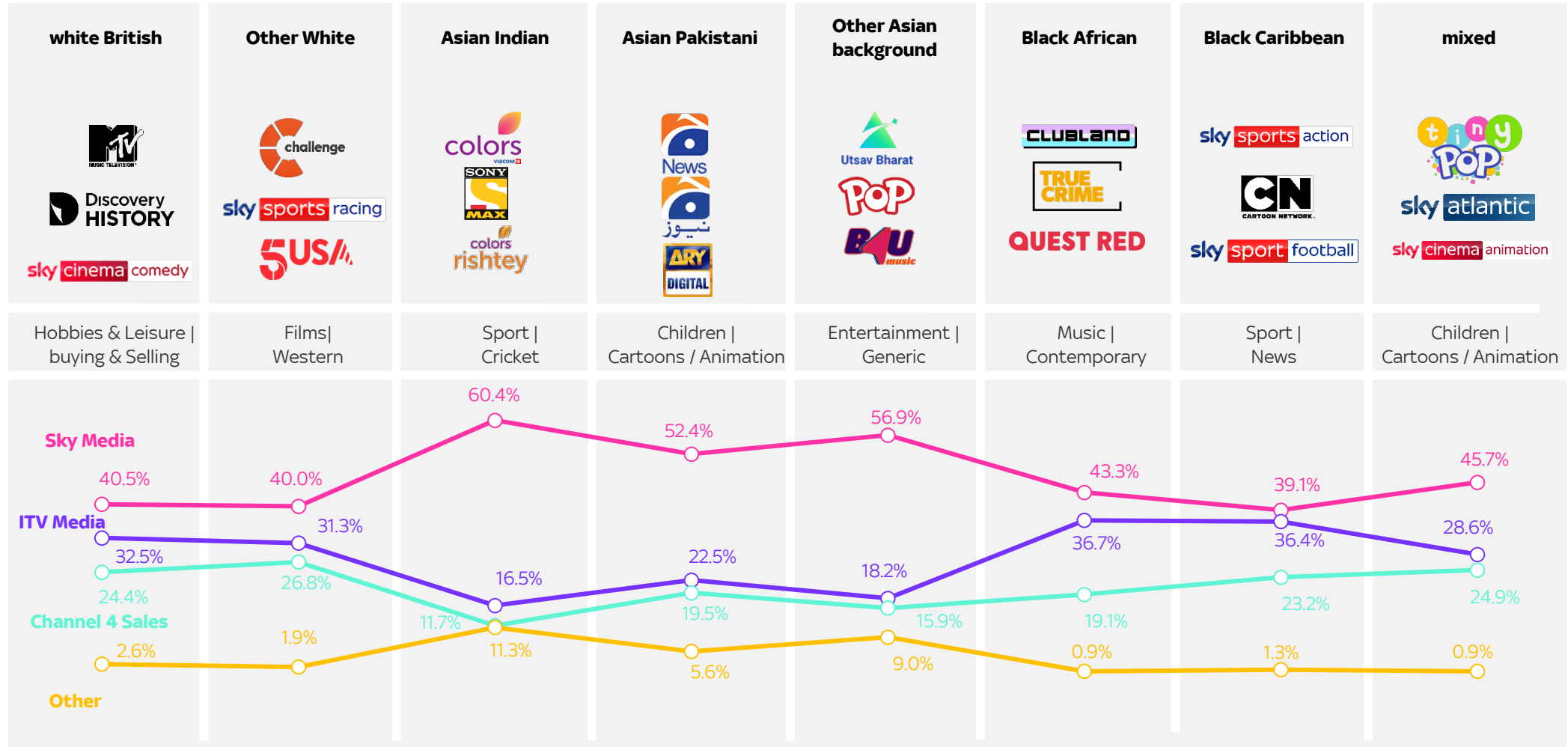
Source : BARB / Tech Edge standard version based on 7-day consolidated viewing
Mums, dads and parents based on those with youngest children aged 4-9 (and gender)
Grandparents based on those 55+ with oldest children older than 16 - programmes based on top performing 20 eps (Jan-Aug)

10. Different ethnicities have differing viewing behaviours



Source: Barb / Tech Edge, based on standard version TV set viewing only, based on claimed ethnicity, top indexing channels based on sky media channels „ Q4 2023, based on TV set viewing

10. Different ethnicities have differing viewing behaviours



Source: Barb / Tech Edge, based on standard version TV set viewing only, based on claimed ethnicity, top indexing channels based on sky media channels , top genre is top sub-genre (with sov <1% for Inds), Q4 2023

VoD gives content life



The Idol



Succession

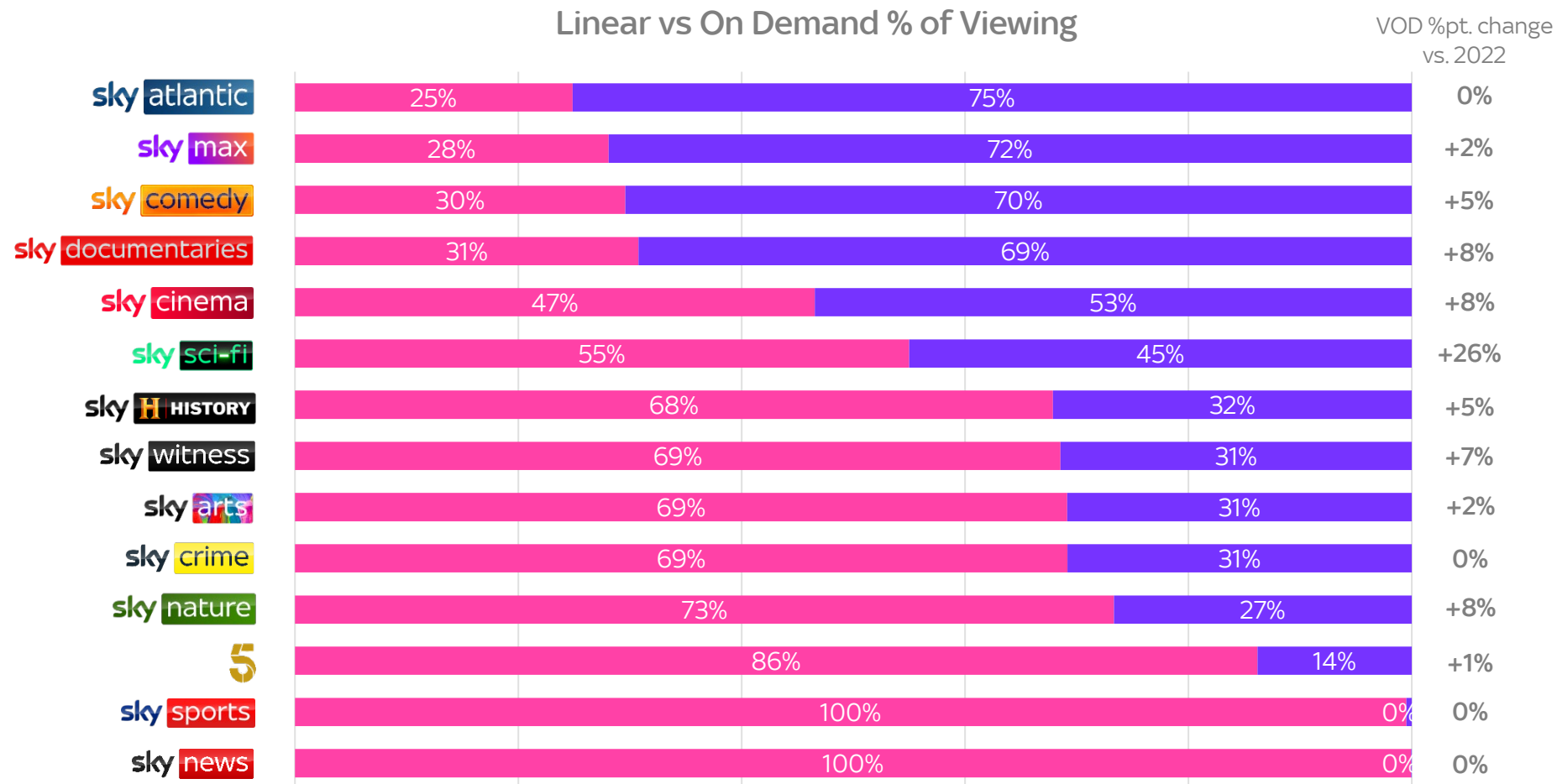


Dreamland

11.
150,000
hours
(25 years)

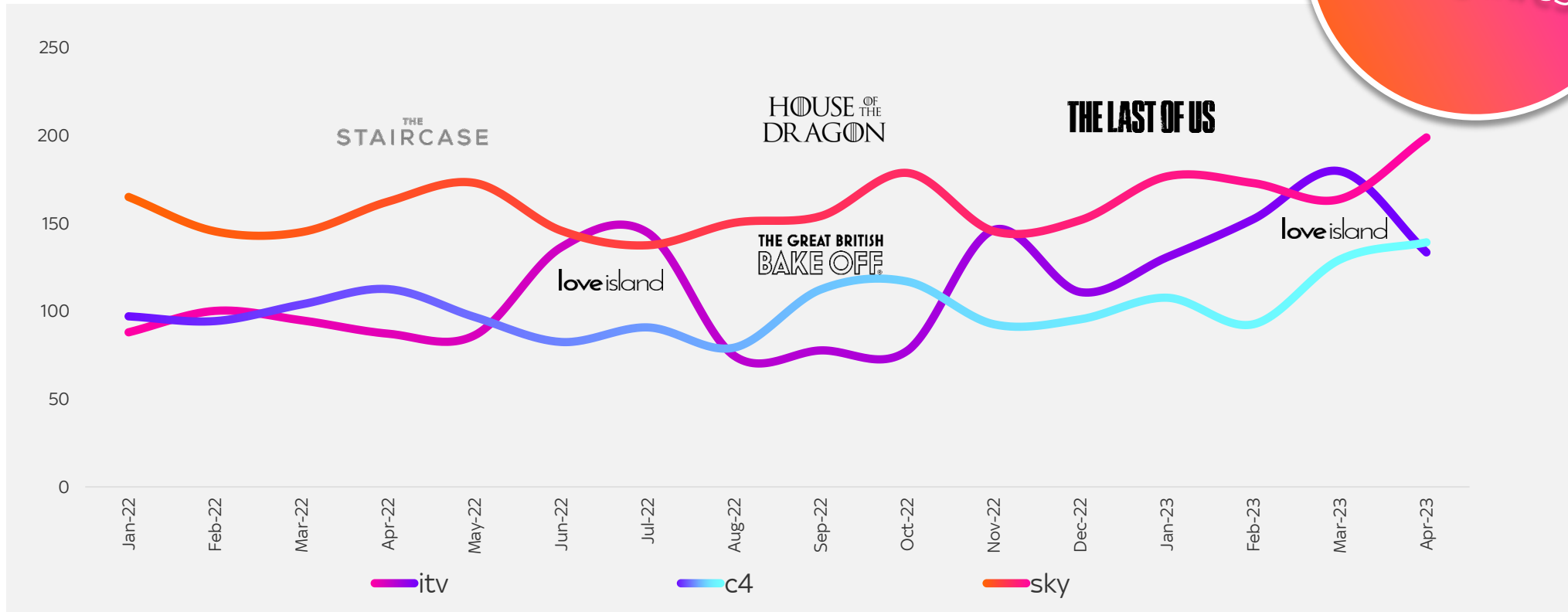


12. Platform performance by genre



13. Higher, more consistent viewing

3x reach with 6-10 genres



Source: BARB Dovetail 4+ | All On Demand by sales house | Jan 22- April 23 ; Average 000s

14. The long tail of the Dragon

3.3m
Day 1-7

4.4m
Day 8-28

5.3m
Day 500

Source: Barb / Tech Edge (as viewed) all eps (sum 000s) to episode 1 of House of The Dragon Sky Atlantic, all Inds 4+ based on 500 days since premiere (21.08.22)



15.



1.5m

Season 4 ep1 premiere 2024



0.5m

Season 1 ep1 premiere 2014
(viewing since s4 ep1 launched)

16. On demand continues to drive greater incremental cover

£2m budget of 50% linear & 50% VOD adds....

2021



2023



...over and above a £2m 100% linear only campaign

17. VoD delivers greater effectiveness

Driven by better engagement

44%

Ad Recall Increase

+10%

ROI

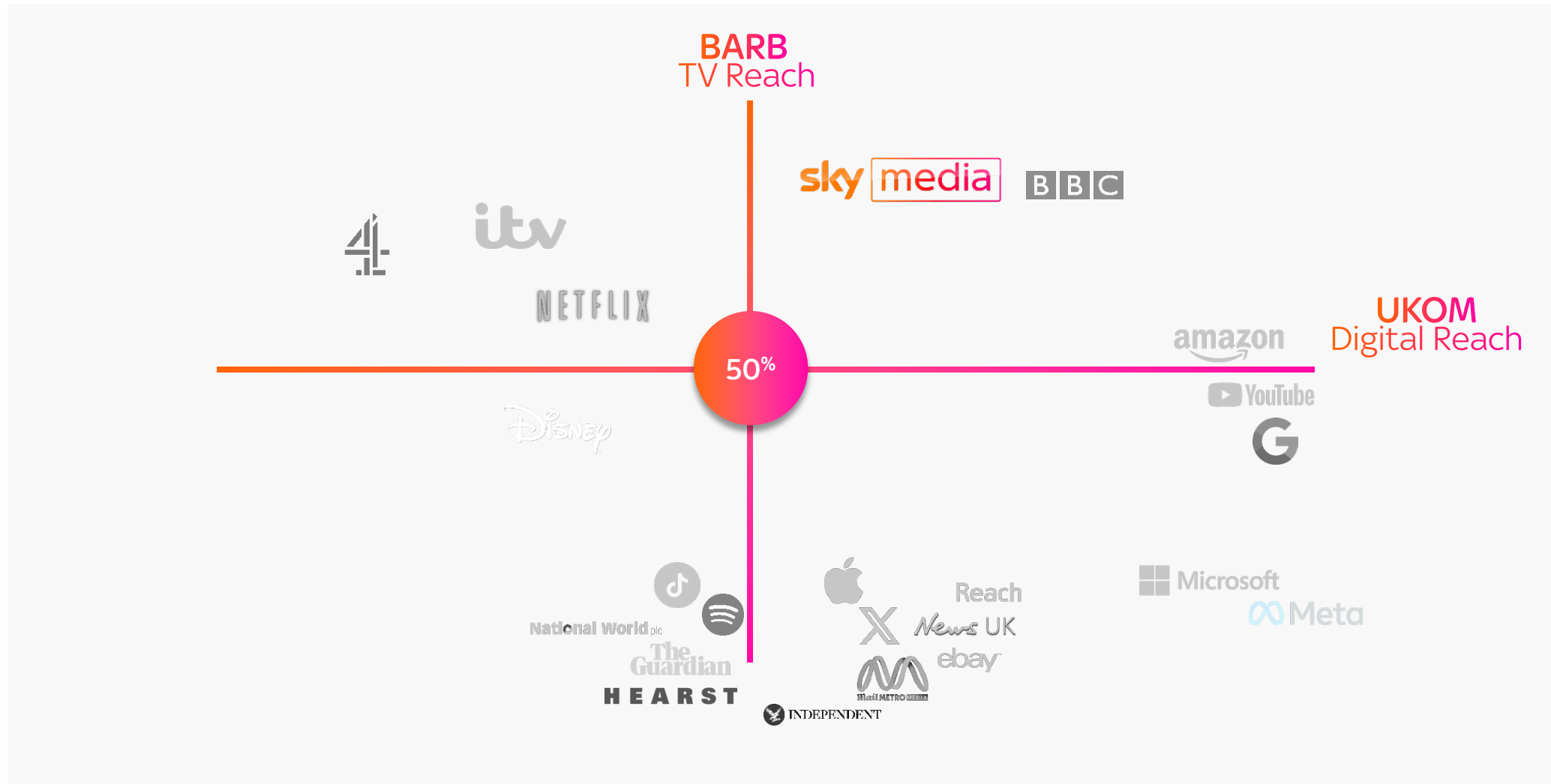
2x

Response



Not just the TV set

18. Unique cross-platform positioning





sky sports

Biggest year ever
for linear viewing

sky sports

The UK's number 1
commercial sports
publisher



MARCO SIMONE
ROVINE, ITALY



FINCA CORTESIN
ANDALUCIA, SPAIN
2023



Premier League



EFL



EFL



YouTube +6%

TikTok +86%

19. Must see content catches the public's imagination...and grows viewing



2.4m

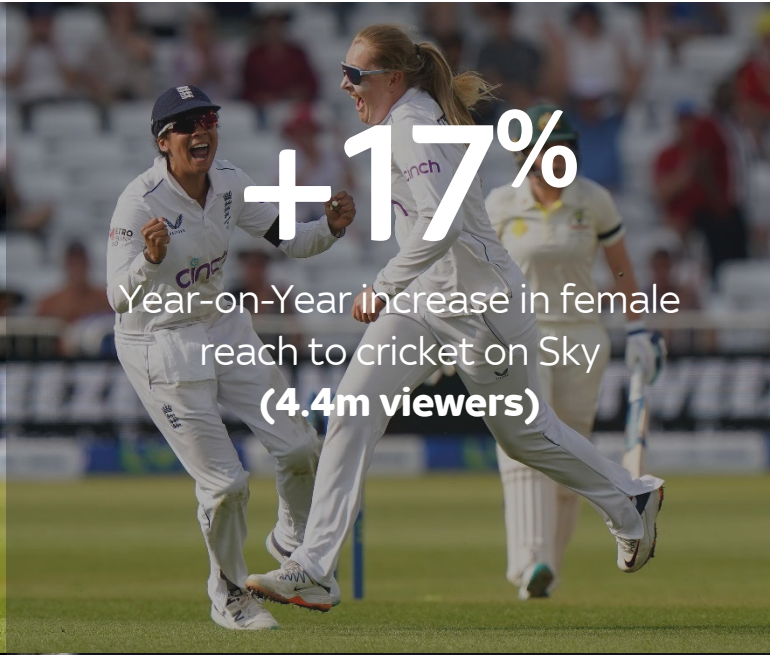
followed the live blog on the Sky Sports website & app, over **3 times bigger** YoY

4.8m

reach for the Final

3.7m

peak, the highest ever non-football peak on Sky Sports



+17%

Year-on-Year increase in female reach to cricket on Sky
(4.4m viewers)



505k

Women who watched any WSL coverage last season and nothing else on Sky Sports



+6%

Year-on-Year increase in female reach to golf on Sky
(3.4m viewers)



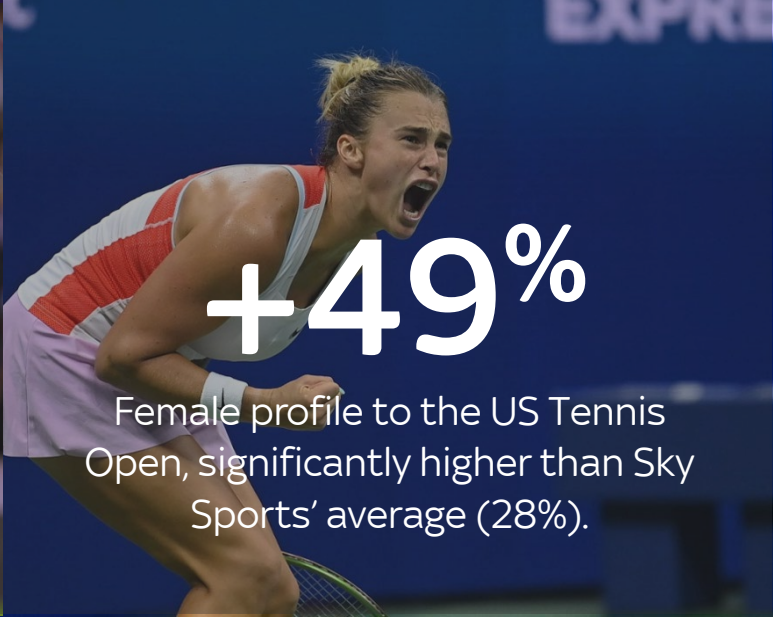
+28%

Sky Sports audience to Women's sport vs 2021
YoY consecutive growth



1.2m

Females viewed Arsenal vs. Manchester United, the 5th biggest commercial programme of the day



+49%

Female profile to the US Tennis Open, significantly higher than Sky Sports' average (28%).

20. Women's sport is broadening the sports fan base

21. News consumption is changing



Source: Enders Analysis/Ofcom News consumption in the UK: 2023

22.

+5%

additional audience to
Sky News Online
2.0m



4.2m

sky news

+17%

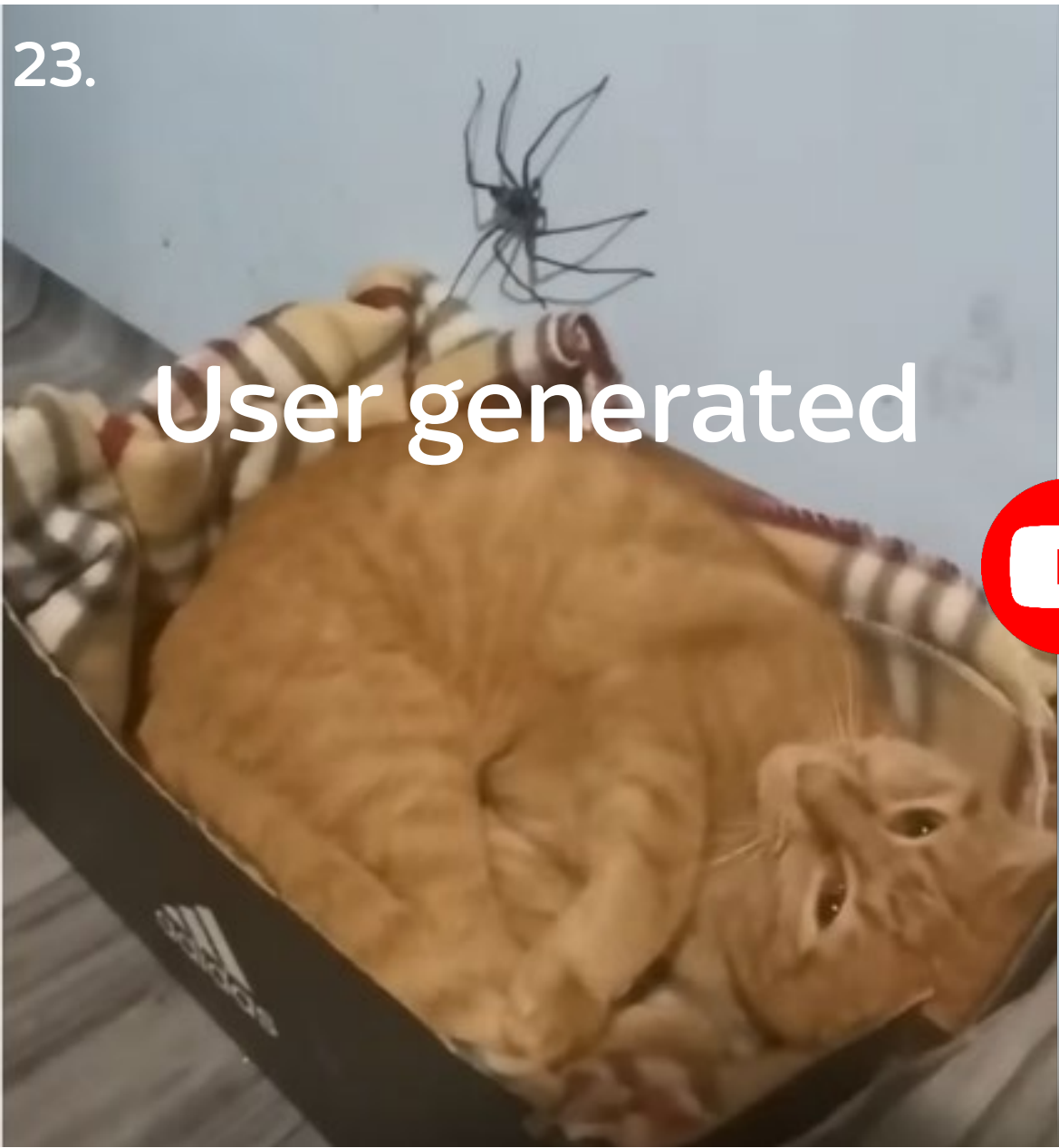
additional audience to
Sky Sports Online

2.5m

sky sports



23.



User generated



Premium content

sky sports

Bonus slide

Sky platform users and their most popular chocolate bars



Sky Homes



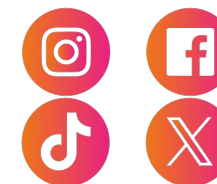
Sky Go users



Sky Digital Audience (O&O)



Sky YouTube Audience



Sky social audience

1



2



3



4



5

