

*sky*SPORT NOW

sky

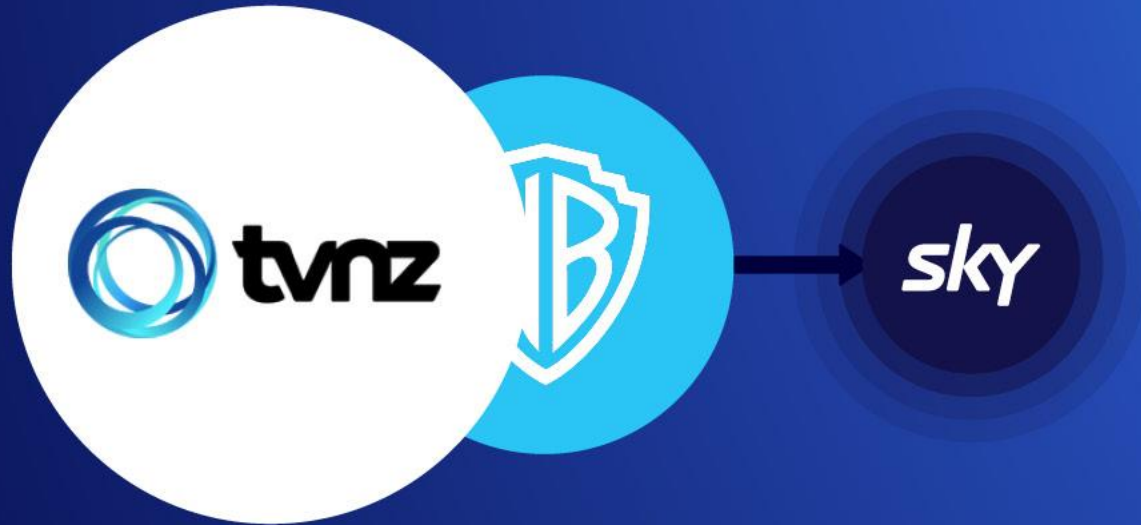
Sky's Digital Journey

Transitioning From a Traditional 'Linear Only' Business



To Carving Out Our Own Unique Market Position

NZ's most engaging and essential multi-platform media company



Leveraging:

Strong mix of local & global content

Leading data & tech

Multi-platform linear + VOD

High quality customer & advertiser experience



Sky World - Audience



Sky Box and Sky Pod

1.5 Million
WEEKLY REACH¹



Free-to-air

1.2 Million
WEEKLY REACH²



Streaming

802,000
WEEKLY VIEWERS³



Sky Social Media

1.7 Million
FOLLOWERS ACROSS
CHANNELS

Commercial
6,500 Businesses

2,000
Licensed Premises

45,000
Hotel & Motel Rooms

3,100
Gyms, Retail Stores, Corporate offices,
Aged Care Lounges, and various Waiting
rooms



WHAT IS SKY SPORT NOW?



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WATCH LIVE & ON DEMAND

ANYTIME. ANYWHERE. ANY DEVICE.



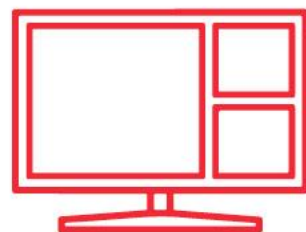
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EXPERIENCE LIVE SPORT LIKE NEVER BEFORE



WATCH FROM START

Missed the start? Simply watch live from start



MULTIVIEW

Watch up to 4 channels simultaneously on web



24 HOUR PLAYBACK

Couldn't watch the game? No worries, you have 24 hours to view



CAST TO YOUR TV

Use Chromecast or AirPlay to cast all the action to your big screen

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SKY SPORT: OUR CONTENT

THE BIGGEST BUNDLE OF HIGH VALUE SPORT



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THE SKY SPORT NOW AUDIENCE

WHO ARE THEY AND HOW DO THEY LIKE TO ENGAGE?



AUDIENCE SNAPSHOT

Audience Reach



Annual
Streams

+51.3M²



Total Unique
Accounts

297,504²



Average Weekly
Reach

253,000²

Who's Watching

Gender Split¹

Female **32%**



Male **68%**



Average Household Income

\$134,800¹



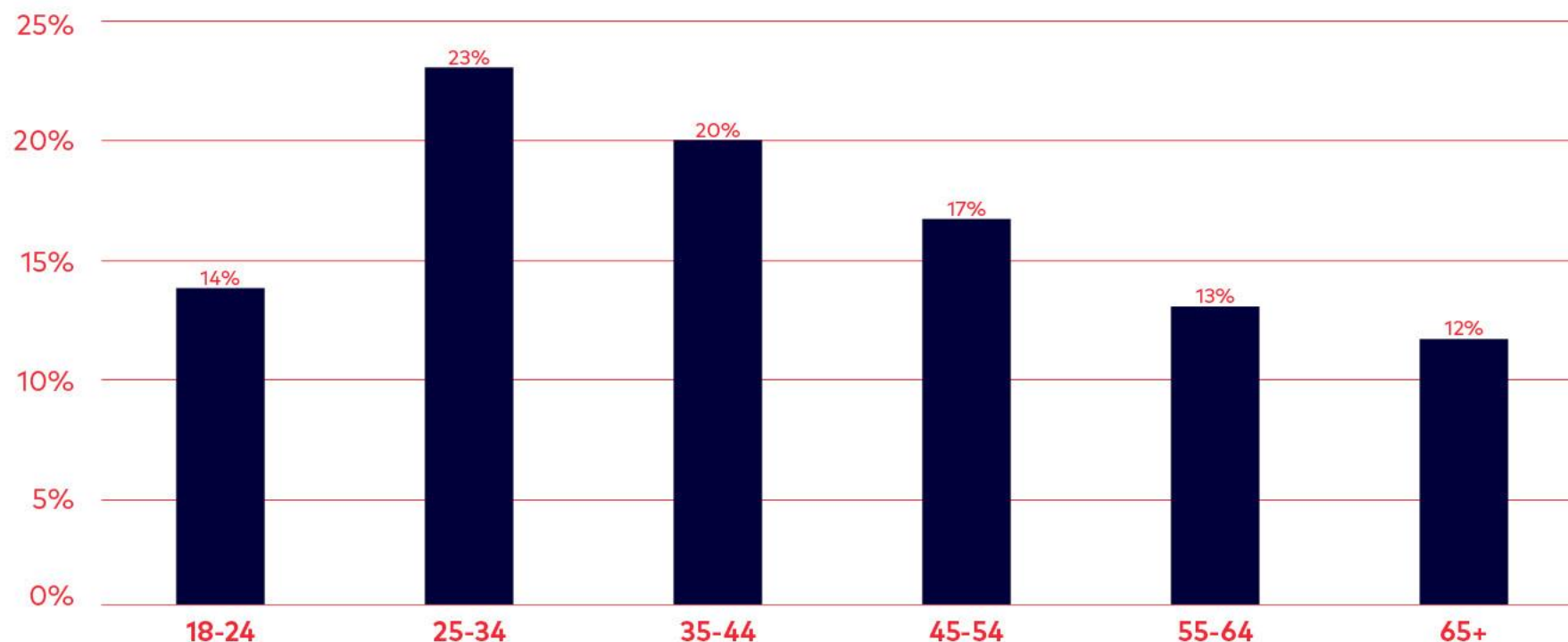
Source 1: Nielsen CMI, Q1 2023 - Q4 2023, AP15+. Online video/TV services used L7D. 2: Sky Internal Data 2023



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SKY SPORT NOW AUDIENCE

SKEWS YOUNGER, BUT DISTRIBUTION IS STRONG ACROSS ALL AGE GROUPS

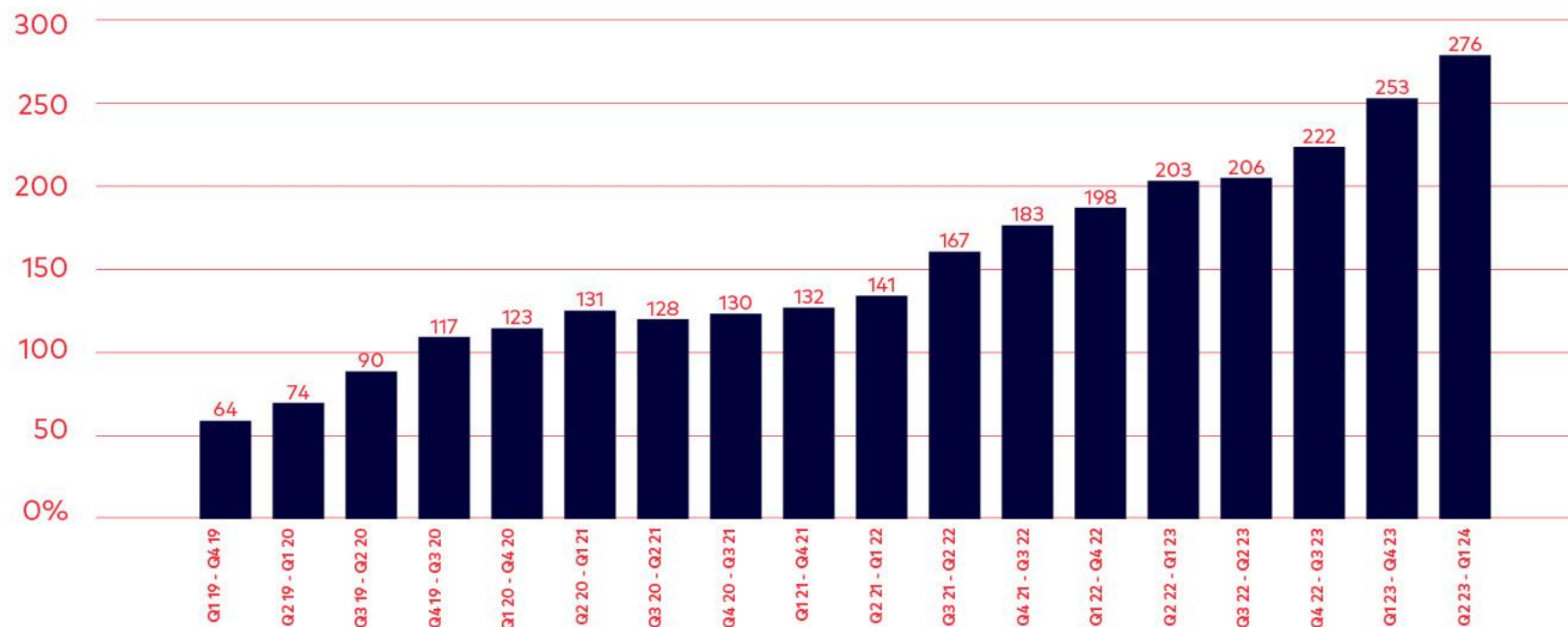


Source: Sky Sport Now 2024

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SKY SPORT NOW VIEWERSHIP CONTINUES TO GROW

WEEKLY VIEWERS



Source Nielsen CMI

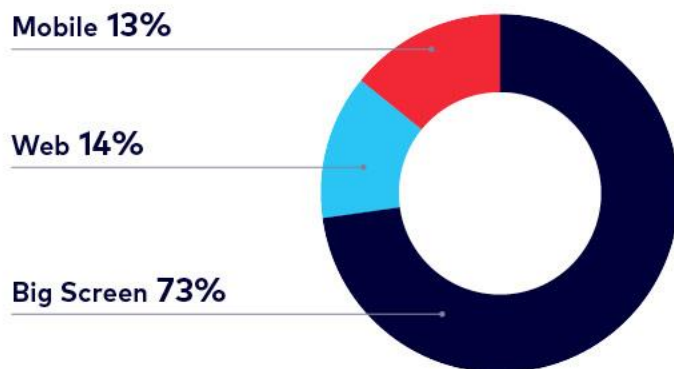
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HOW SKY SPORT NOW'S AUDIENCE CONSUMES CONTENT

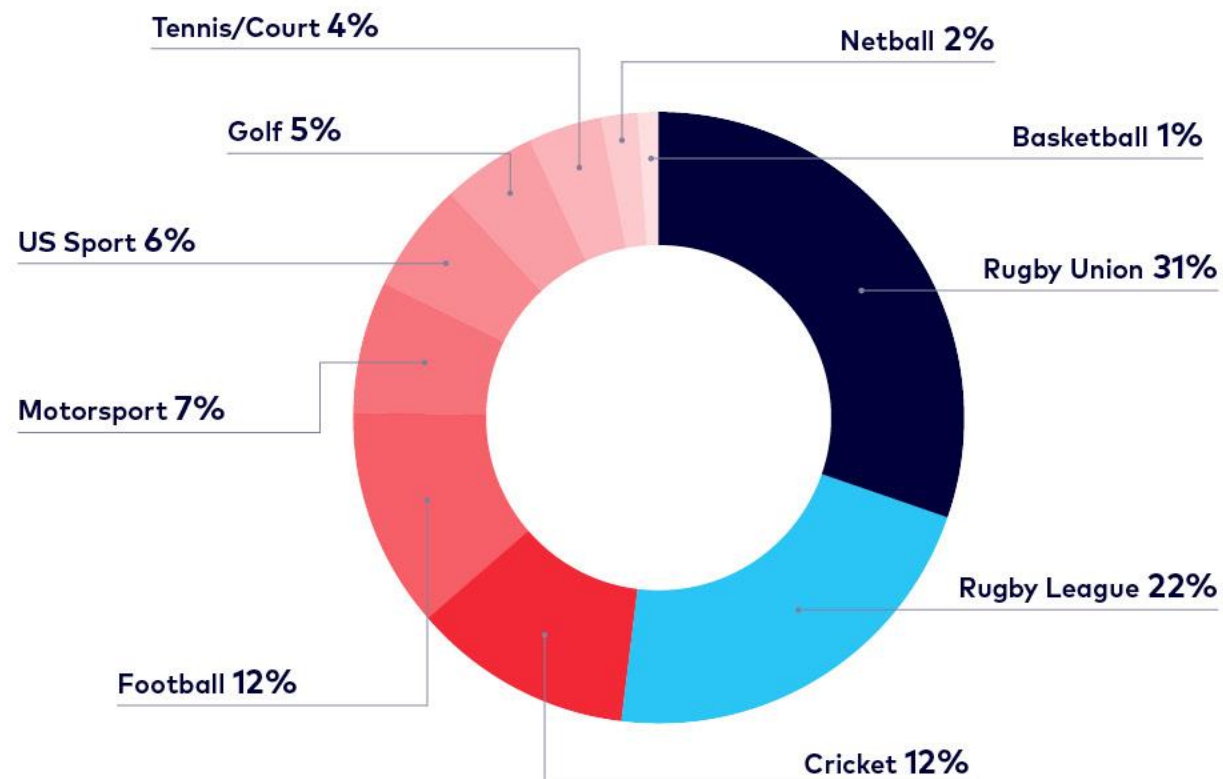
LIVE VS VOD



PREFERRED DEVICE (VOD & LIVE)



TOP 10 SPORT BY CONTENT (LIVE ONLY)



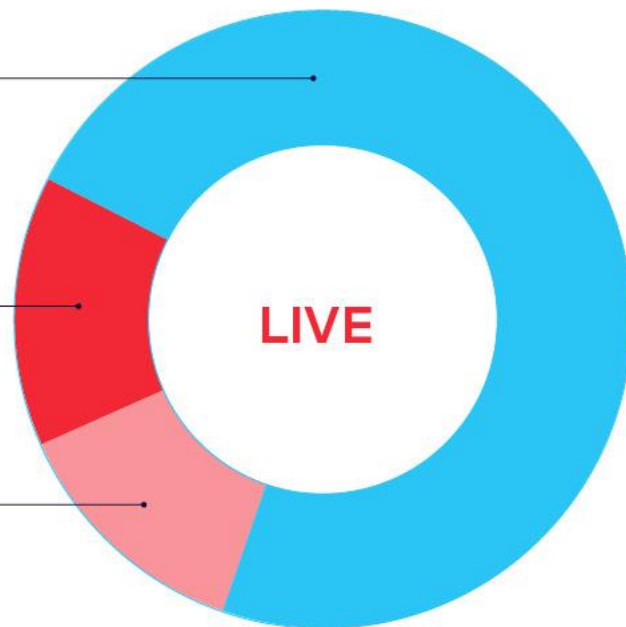
Source Sky Internal Data 2024

DEVICE PREFERENCE ISN'T AFFECTED BY LIVE VS VOD

Big Screen **73%**

Web **14%**

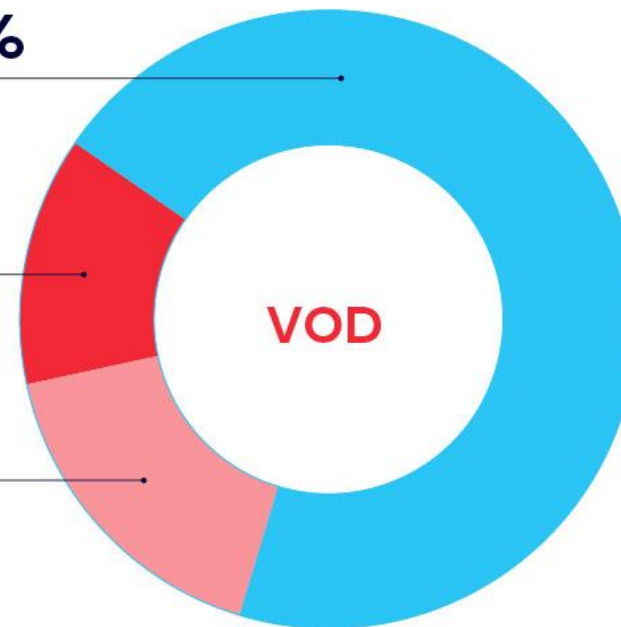
Mobile **13%**



Big Screen **70%**

Web **13%**

Mobile **17%**



















Source Sky Internal Data 2024

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SKY AUDIENCES ARE SPORTS FANS!

VIEWERSHIP BY SPORT - UNIQUE ACCOUNTS

	 Rugby Union	 Rugby League	 Cricket	 Motorsport	 Football	 Tennis/Court	 US Sports	 Golf
Rugby Union	 95%	72%	68%	63%	69%	48%	45%	41%
Rugby League	95%	 79%	75%	72%	77%	56%	53%	50%
Cricket	94%	79%	 82%	75%	80%	61%	54%	53%
Motorsport	95%	83%	82%	 81%	81%	62%	57%	56%
Football	94%	79%	78%	72%	 90%	60%	54%	52%
Tennis/Court	96%	87%	89%	82%	90%	 68%	64%	65%
US Sports	96%	88%	84%	80%	85%	68%	 68%	62%
Golf	98%	90%	90%	87%	91%	76%	68%	

Source Sky Internal Data

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SKY AUDIENCES ARE SPORTS FANS!

ENGAGEMENT ACROSS A RANGE OF CODES AND CONTENT

Rugby Union 251,629		Rugby League 193,017		Cricket 177,473		Motorsport 166,999	
Football 160,666		Tennis/Court 130,710		Golf 108,444		Fight Sport 102,744	
US Sports 101,123		Watersports 66,830		Cycling 64,145		Athletics 43,193	

■ Unique Views

Source Sky Internal Data

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AUDIENCE BY TOURNAMENT

 193,021 Rugby World Cup 2023	 177,295 NRL Premiership 2023	 150,668 Rugby Bunnings NPC 2023	 131,193 FIFA Women's World Cup 2023	 129,367 Super Rugby Pacific 2023	 126,557 ICC Cricket World Cup 2023	 126,511 Rugby Championship 2023
 122,522 FIA Formula One World Championship 2023	 108,017 Rugby Heaven 2023	 94,598 Rugby WXV 2023	 94,427 Netball World Cup 2023	 87,519 Supercars Championship 2023	 87,347 Rugby Farah Palmer Cup 2023	 85,614 Premier League 2023/2024
 83,781 Bledisloe Cup 2023	 78,543 Premier League 2022/2023	 75,810 Rugby All Blacks Internationals 2023	 75,136 The Crowd Goes Wild 2023	 71,733 Sunday Night With Matty Johns 2023		

Source Sky Internal Data

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SKY'S SPORT AUDIENCES ACROSS PLATFORMS



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CALCULATING CO-VIEWING

We know...



Streaming data in UVs is device only – not actual audience



73% of content on SSN is consumed on a CTV



93% of content consumed on SSN is Live



Live sports events on CTV are highly likely to be viewed by multiple people

A Glasshouse Consulting online survey with **over 1000 Sky Sport account holders** showed an **average co-viewing figure of x2.3**.
Note data is preliminary and indicative only, based on 4 weeks data as part of an ongoing survey, final weighting not yet applied

Source: Glasshouse Consulting. Online survey 24th June to 16th July 2024. n = 1333 (Sky Sport account holders). Note data is preliminary and indicative only, based on 4 weeks data as part of an ongoing survey, final weighting not yet applied.



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SKY DELIVERS REACH ON SPORTS!

TOTAL SKY REACH ACROSS SPORT IN 2023

sky
SPORT

2,921,489

sky OPEN

3,106,325

sky SPORT
NOW

654,509

sky
GO

515,185

LINEAR¹

DIGITAL²

Sky Digital offers a 19% incremental increase
on linear sports fans

Source 1: Sky Sports/Open Linear Nielsen TAM, APE+ reach.
Source 2: SSN/Sky Go Sky Internal data for account information using a co-viewing factor based on Glasshouse Co-viewing Study)
Co-viewing factor Source: Glasshouse Consulting. Online survey 24th June to 16th July 2024. n = 1,333 (Sky Sport account holders).
Note data is preliminary and indicative only, based on 4 weeks data as part of an ongoing survey, final weighting not yet applied.

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SKY DOESN'T JUST HAVE LINEAR OR DIGITAL VIEWERS.... WE HAVE NRL FANS, WHEREVER THEY MAY BE

NRL AUDIENCE 2023



LINEAR¹



DIGITAL²

Sky Digital offers a 26% incremental increase on linear NRL fans

Source 1: Sky Sports/Open Linear Nielsen TAM, APE+ reach.
Source 2: SSN/Sky Go Sky Internal data for account information using a co-viewing factor based on Glasshouse Co-viewing Study)
Co-viewing factor Source: Glasshouse Consulting. Online survey 24th June to 16th July 2024. n = 1,333 (Sky Sport account holders).
Note data is preliminary and indicative only, based on 4 weeks data as part of an ongoing survey, final weighting not yet applied.

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SNAPSHOT: WARRIORS VS STORM

15TH JUNE 2024



sky
SPORT
350,900

sky **OPEN**
95,800

sky **SPORT**
NOW
131,930

sky
GO
70,618

LINEAR¹

DIGITAL²

Sky Digital offered a 45% incremental increase on linear Warriors fans

Source 1: Sky Sports/Open Linear Nielsen TAM, APE+ reach.
Source 2: SSN/Sky Go Sky Internal data for account information using a co-viewing factor based on Glasshouse Co-viewing Study)
Co-viewing factor Source: Glasshouse Consulting. Online survey 24th June to 16th July 2024. n = 1,333 (Sky Sport account holders).
Note data is preliminary and indicative only, based on 4 weeks data as part of an ongoing survey, final weighting not yet applied.

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WHY SPORTS?

SPORTS ADVERTISING IS ONE OF THE TOP DRIVERS OF BRAND TRUST, LOYALTY AND PURCHASE INTENT!

2nd

Most trusted channel in advertising (after brand websites themselves)

74%

Are more loyal to brands involved in sporting events

81%

Trust brand sponsors of sporting events

10% ⤴⤴⤴

Recent analysis of 100 sponsorships across 7 markets in 20 industries saw sports sponsorship drove an average of 10% increase in purchase intent

Source: Nielsen: 2022 global sports marketing report

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FEW PLATFORMS DELIVER THE REACH OF ENGAGED AUDIENCES LIKE SPORTS

28%¹

Sports fans are 28% more likely to pay attention to ads than the average adult

35%²

Of New Zealanders are watching at least hour of women's sport

56%²

Of New Zealanders watch at least 1 hour of sport per week

80%³

Of sample of the 1000 highest reaching ads campaigns included sports!

Source 1: MRI Simmons, Source 2: Sportnz 2022 It's Time, Source 3: Comcast Aggregated Viewership Data combined with Ad Exposure Data from TV + Effectiv campaigns (1H '23). Filtered to the 1,000 highest reaching campaigns

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RESEARCH BY AMPLIFIED INTELLIGENCE SHOWS SKY IS A LEADER AT DRIVING ATTENTION FOR BRANDS



Amplified
Intelligence

sky

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...AND SPORTS ON SKY VOD LEADS THEM ALL!

13.8s

Sky leads all VOD in capturing 'active attention' on 30s Ads!

And live sports lead on Sky VOD...
outperforming entertainment by

34%

more active attention

17.1s

Combine this with engaged viewers and you're looking at an average Active Attention of 17.1s when watching Sports

Source: Sky & Amplified Intelligence 2023

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NOTHING ELSE EVEN COMES CLOSE

SKY LEADS ALL VOD IN CAPTURING 'ACTIVE ATTENTION' ON 30S ADS!

Sky VOD **13.8s**

FTA VOD 10.4

Live FTA TV 6.7

Live Paid TV 6.2

Video Platform 4.9

Social Media B 3.4

Social Media C 2.4

General Web 1.6

sky

LIVE



Source: Sky & Amplified Intelligence 2023

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WHAT DOES THIS MEAN FOR BRANDS?

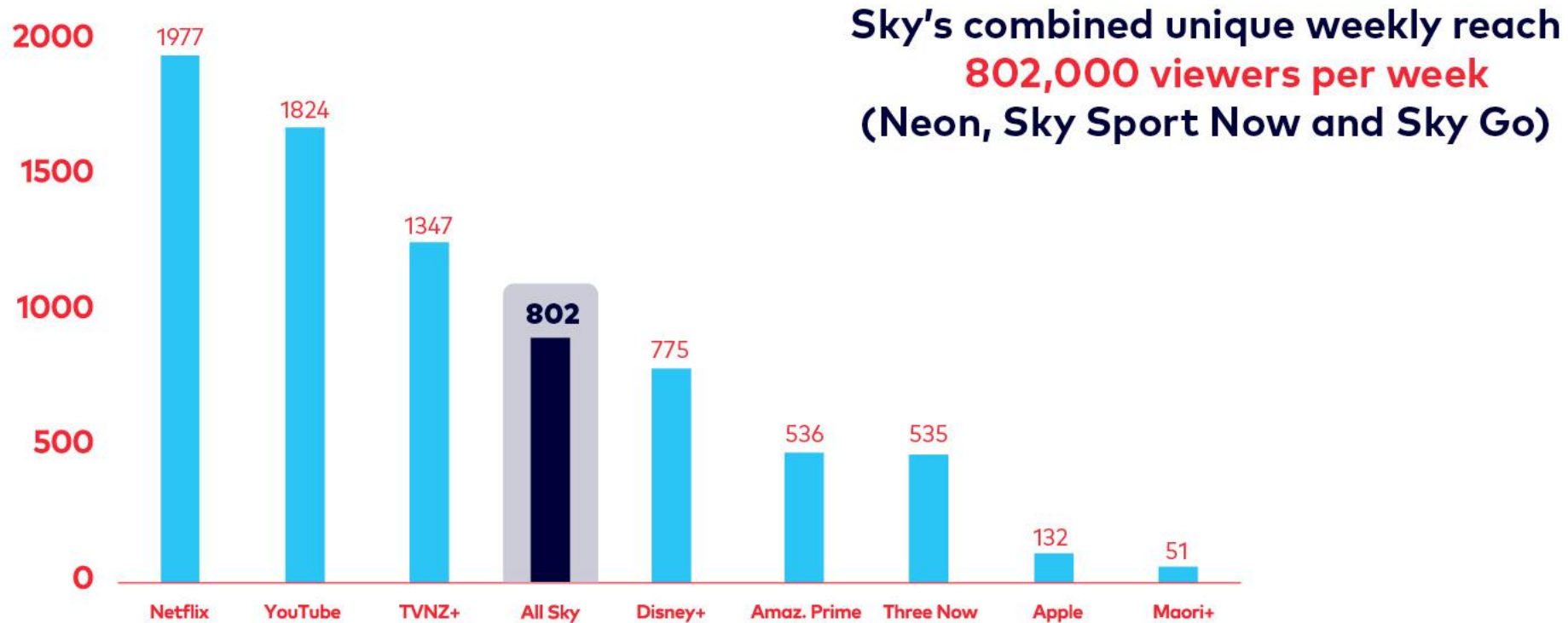
**WE HAVE THE SPORTS.
WE HAVE THE PLATFORMS.
WE HAVE THE FANS.**

Nothing grabs and holds audience attention like ads during sport on Sky Digital platforms!



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HOW BIG IS SKY'S DIGITAL ADVERTISING OPPORTUNITY?



Nielsen CMI, Q1 2023 - Q4 2023, AP15+, Online video/TV services used L7D

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HOW WILL ADS WORK ON SKY SPORT NOW?

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LAUNCHING LIVE DIGITAL AD INSERTION INTO SKY SPORT NOW

Currently, when you're watching your favourite sport on Sky Sport Now, you're watching the same ad as linear viewers.

CURRENTLY

Linear Feed



Digital Stream



All viewers see the same commercial spot

DAI lets you deliver personalised ads during New Zealand's most popular live sporting events, reaching the right audience at the perfect moment.

WITH DAI

Linear Feed



Digital Stream



Segments of viewers see unique and highly relevant commercial spots

WHY IS DAI SO POWERFUL FOR ADVERTISING?

TARGET THE RIGHT AUDIENCE AT THE RIGHT TIME WITH A PERSONALISED AD ON A BIG SCREEN

The Advantages of Digital Ad Insertion

Data-driven targeting

Omnichannel strategy

Incremental reach

Smarter optimisation

Premium inventory

Precise frequency



DAI DELIVERS A SEAMLESS AD EXPERIENCE

Ads on Sky Sport Now seamlessly integrate into live sports broadcasts, mirroring TV ad patterns.

THIS MEANS:

- Controlling ad frequency
- Ensuring no repetitive ads
- No competing brands within the same ad break

LIVE PRE-GAME	AD POD	LIVE SPORT	AD POD	LIVE SPORT	AD POD	LIVE POST-GAME
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Every ad pod is 3-4 minutes with 15" and 30" spots
45"/60" available with AdOps Approval

LIVE SPORT (2 HOURS)	
skySPORT NOW + skyGO	FTA
13 minutes of Ads	25 minutes of Ads
Approximately 39 ads	Approximately 83 ads

*Ad estimate assumes equal 15" and 30" split

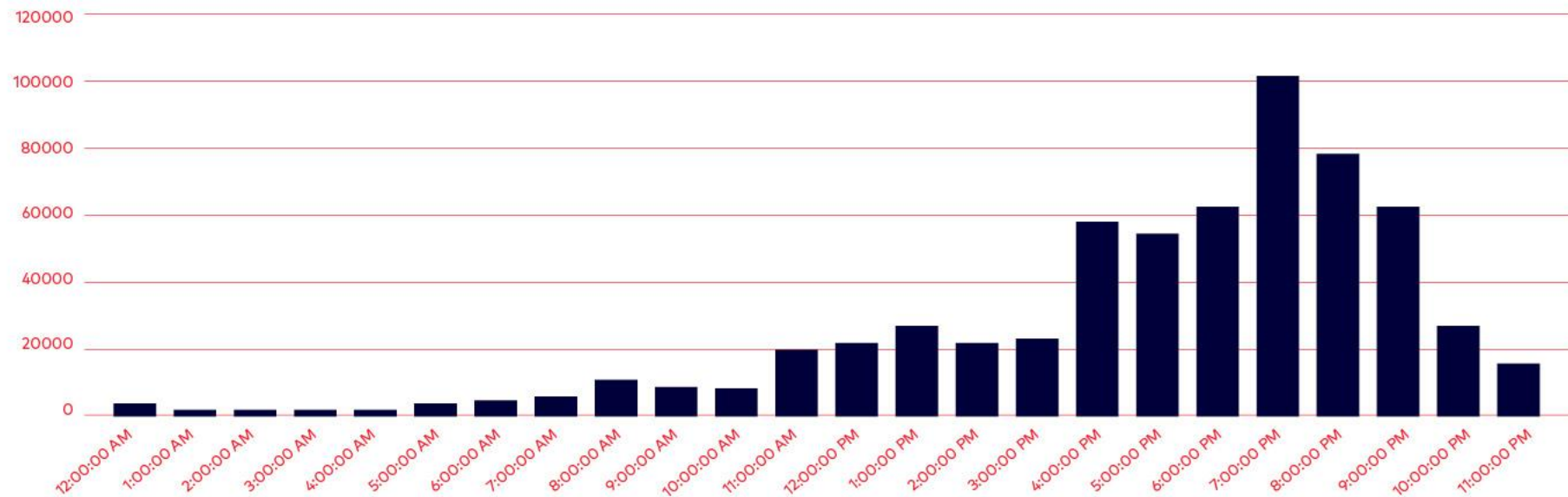


HOW CAN YOU BUY?

PACKS / DIGITAL AUDIENCE / AUCTION DYNAMICS

LIVE APPOINTMENT VIEWING: ENGAGEMENT NATURALLY SKEWS DURING PEAK HOURS AND LIVE EVENTS

08/06/2024: WARRIORS AND SUPER RUGBY DAY



Campaign snapshot of one day 08/06/2024

So we optimise impressions to reach viewers when they're watching

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SKY SPORT NOW APPROACH TO PRICING



*All booking can be booked via Direct IO or Programmatic Guaranteed (excluding Auction-based deals)

LAUNCH PHASES

- Launching 24 October 2024
- Devices includes Mobile + Web + majority of CTV
- Remaining CTV devices will be switched on throughout November 2024
- Mobile and Web: Initial launch across all 10 Sky Sport channels
- CTV: Initial launch on Sky Sport 5 – 9 and Sky Sport Select only
- CTV: SS1 – SS4 to launch February 2025

OUR TOP FIVE HIGHLIGHTS

- Sky Sport Now offers New Zealand the most premium range of sport, live and on-demand. Anytime. Anywhere. Any device.
- Sky has the most engaging streaming platforms and the most engaging content, backed up by science. Now it's turning on digital ads!
- Digital sports audiences are continuing to grow and digital is fast becoming the preferred way of viewing, particularly younger New Zealanders.
- Sky is bringing DAI to all its sports, allowing targeted, data driven, optimised campaigns.
- DAI is being rolled out in 3 phases, with all devices and channels being DAI capable by February 2025.