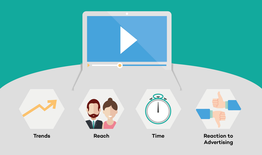
THE POWER OF VIDEO ON DEMAND (VOD) | 2016

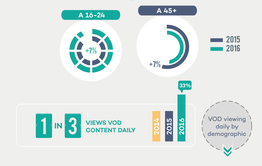


KEY INSIGHTS & TRENDS:

JUST UNDER **3 IN 4** IRISH ADULTS (16+) **VIEWED VOD** IN THE **LAST 6 MONTHS**

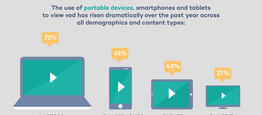
SLIGHTLY HIGHER THAN THIS TIME LAST YEAR

Growth is particularly strong among 16-24s and 45+ demographics



1 IN 3 VIEWS VOD CONTENT DAILY

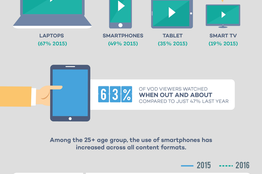
VOD viewing daily by demographic



2 IN 3 WATCH FOR **1+HOURS** PER DAY

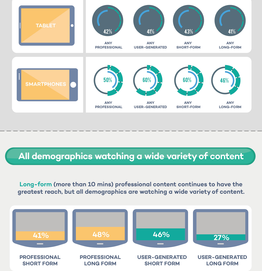
Use of portable devices growing

The use of **portable devices**, smartphones and tablets to view vod has risen dramatically over the past year across all demographics and content types:



6 3 % OF VOD VIEWERS WATCHED **WHEN OUT AND ABOUT** COMPARED TO JUST 47% LAST YEAR

Among the 25+ age group, the use of smartphones has increased across all content formats.



All demographics watching a wide variety of content

Long-form (more than 10 mins) professional content continues to have the greatest reach, but all demographics are watching a wide variety of content.

VOD VIEWERS WATCH BOTH FREE AND PAID CONTENT

8 8 % FREE SERVICES (Free Ad-funded platforms / peer To peer)

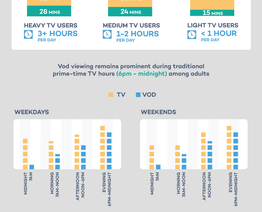
5 5 % PAID SERVICES (Subscription, Pay-per-view)

4 3 % WATCH BOTH FREE AND PAID SERVICES

VOD delivers on hard-to-reach audiences

Use of on-demand viewing per typical hour among hard-to-reach light tv viewers increased in the last year

Vod viewing remains prominent during traditional prime-time TV hours (6pm – midnight) among adults



A THIRD OF VOD VIEWERS CLAIM TO WATCH **MORE VOD THAN TV**, RISING TO 79% AMONG ADULTS 16-24.

Advertising is not a barrier to viewing VOD

Advertising acceptance in and around VOD content is rising among medium/heavy VOD users

UP FROM 48% TO 54%

4 IN 5 who watch long-form programming **did not feel** that advertising was a barrier

Advertising in and around VOD leads to further brand engagement:

24% VISITED A BRAND'S WEBSITE OR PHYSICAL LOCATION

20% SEARCHED FOR THE BRAND OR PRODUCT

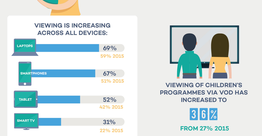
16% CLICKED ON THE AD TO FIND OUT MORE INFO ABOUT THE BRAND

11% HAVE BOUGHT THE BRAND

16% AMPLIFIED THE MESSAGE ABOUT THE BRAND VIA WORD OF MOUTH

Snapshot Housekeepers with kids

Housekeepers with kids are becoming more active viewers of VOD:



3 0 % WATCH VOD DAILY (22% 2015)

VIEWING IS INCREASING ACROSS ALL DEVICES:

VIEWING OF CHILDREN'S PROGRAMMES VIA VOD HAS INCREASED TO **3 6 %** FROM 27% 2015

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