1 Time-Shift Measurement – what we report / what we measure
2 Market Overview
3 Viewing Trends – Individuals 4+
4 Viewing Trends by Age
5 Profile of Viewing by Genre
6 TSV Uplift – Programmes versus Commercial Breaks
WHAT WE REPORT

Currency

Consolidated:
Live + TSV within 168 hours of original broadcast

Time-shift data is reported by day and includes VOSDAL, along with a split of time-shift activity by day from days 1-7.

Time-shift viewing is allocated back to the original broadcast, rather than the time at which the time-shifted activity was viewed.

Only content watched at normal speed is included in the reported data.

TSV data available for day-parts, programmes & commercials.
ANALYSING TIME-SHIFT BEHAVIOUR

Day-parts

Programmes

Commercial Breaks

Day-part analysis includes viewing to all type of events, including programmes, commercial spots, sponsorship stings and channel promos.

Programme analysis includes viewing that took place at any point between the start-time and end-time of the programme and therefore includes viewing to any commercial breaks scheduled within the programme.

Break analysis includes viewing that took place at any point between the start-time and end-time of the commercial break.
MARKET OVERVIEW
TV MARKET OVERVIEW

TV UNIVERSE: HOUSEHOLDS
1,578,000

TV UNIVERSE: INDIVIDUALS
4,098,000

PVR PENETRATION

HOUSEHOLDS WITH PVR
943,000

Average person watches TV for 3 hrs & 6 mins daily

89% of viewing is live

TV HOUSEHOLD PROFILE BY PLATFORM

Sky
42%

Cable
23%

FTA Satellite
17%

UK DTT
6%

Irish DTT
12%

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1 Based on January 2017 Universe Data
2 Based on Average Minutes Per Person, Individuals 4+, Total TV, All-Day, January – December 2016
PVR OWNERSHIP

Ownership grew significantly in 2012

Source: Establishment Survey / Based on Respondent Awareness
PVR OWNERSHIP BY RECEPTION

Cable Homes
PVR ownership levels have always been lower in Cable homes than in Sky homes

Sky Homes
In absolute terms, there are twice as many Sky homes with a PVR compared to Cable homes

Source: Establishment Survey / Based on Respondent Awareness
TSV ACCOUNTS FOR MORE VIEWING IN SKY HOMES THAN IN CABLE

Source: TAM Ireland Ltd / Nielsen TAM
TSV as % of Consolidated based on Average Minutes Per Person, Total TV, Individuals
PVR OWNERSHIP BY REGION

Region

- PVR ownership is considerably higher in Dublin than in other regions

Urban / Rural

- Almost 70% of Urban homes claimed to have a PVR in the latest ES compared to just under half of homes in Rural areas

Source: Establishment Survey January 2017 / Based on Respondent Awareness
PVR OWNERSHIP BY HOUSEHOLD TYPE

Social Class
PVR ownership is highest in ABC1 Homes

Presence of Kids
PVR ownership is considerably higher in Households with Kids

Age of Housekeeper
PVR ownership is highest in Households where the Housekeeper is aged 35-44 and lowest in Households where the Housekeeper is aged 55 or older

Source: Establishment Survey January 2017 / Based on Respondent Awareness
VIEWING TRENDS
INDIVIDUALS 4+
PROFILE OF 7-DAY VIEWING

Individuals 4+

<table>
<thead>
<tr>
<th>Year</th>
<th>Live</th>
<th>VOSDAL</th>
<th>TSV 1-7</th>
</tr>
</thead>
<tbody>
<tr>
<td>2011</td>
<td>93%</td>
<td>4%</td>
<td>3%</td>
</tr>
<tr>
<td>2012</td>
<td>91%</td>
<td>5%</td>
<td>3%</td>
</tr>
<tr>
<td>2013</td>
<td>91%</td>
<td>5.5%</td>
<td>3.5%</td>
</tr>
<tr>
<td>2014</td>
<td>91%</td>
<td>6%</td>
<td>3%</td>
</tr>
<tr>
<td>2015</td>
<td>89%</td>
<td>7%</td>
<td>4%</td>
</tr>
<tr>
<td>2016</td>
<td>89%</td>
<td>7%</td>
<td>4%</td>
</tr>
</tbody>
</table>

Source: TAM Ireland Ltd / Nielsen TAM
Based on Average Minutes Per Person, National, Consolidated, Individuals 4+, Total TV, All-Day
% TIME-SHIFT BY DAYPART\(^1\)

TSV accounts for the greatest proportion of viewing during late peak

Source: TAM Ireland Ltd / Nielsen TAM

\(^1\) Based on % Time-shift Average Minutes Per Person, Individuals 4+, Total TV, All-Day, January 2011 – December 2016
VIEWERS CONTINUE TO PLAYBACK PROMPTLY

2011

61%
18%
8%
5%
3%
3%
2%
1%

2016

64%
16%
7%
4%
3%
2%
2%
1%

Source: TAM Ireland Ltd / Nielsen TAM

1 Based on % 000s, Total TV, All-Day, January-December 2011 and 2016
VIEWING TRENDS BY AGE
TIME-SHIFT LEVELS HIGHEST FOR 25-44 YEAR-OLDS

The proportion of viewing accounted for by TSV has grown most for 35-44 year-olds

Source: TAM Ireland Ltd / Nielsen TAM
Time-shift as % of Consolidated based on Average Minutes Per Person, Total TV, All-Day
## TSV Viewers Profile Younger Than Live Viewers

### By Age Group

<table>
<thead>
<tr>
<th>Time-Shift</th>
<th>4-14</th>
<th>15-24</th>
<th>25-34</th>
<th>35-44</th>
<th>45-54</th>
<th>55+</th>
</tr>
</thead>
<tbody>
<tr>
<td>Live</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### By Social Class (Adults 15+)

<table>
<thead>
<tr>
<th>Time-Shift</th>
<th>ABC1</th>
<th>C2DE</th>
<th>F1F2</th>
<th>Timeshift</th>
</tr>
</thead>
<tbody>
<tr>
<td>Live</td>
<td>30</td>
<td>64</td>
<td>7</td>
<td>7</td>
</tr>
</tbody>
</table>

### By Sex

<table>
<thead>
<tr>
<th>Boys</th>
<th>Girls</th>
<th>Men 15+</th>
<th>Women 15+</th>
</tr>
</thead>
<tbody>
<tr>
<td>7</td>
<td>7</td>
<td>35</td>
<td>52</td>
</tr>
<tr>
<td>6</td>
<td>5</td>
<td>42</td>
<td>47</td>
</tr>
</tbody>
</table>

Source: TAM Ireland Ltd / Nielsen TAM
Based on Profile of Total TV, January – December 2016
AUDIENCE DRIVING CHANGES

Key time-shift audiences recorded and played back 23+ minutes per day in 2016

Source: TAM Ireland Ltd / Nielsen TAM
Based on Average Minutes Per Person, Time-shift Individuals 4+, Total TV, All-Day, % Change (2016 –2011)/2011
PROFILE OF VIEWING BY GENRE

*Based on sample of programmes
PROFILE OF 7-DAY PROGRAMME VIEWING
Individuals 4+

Source: TAM Ireland Ltd / Nielsen TAM
1 Based on % Series Average 000s, Individuals 4+, January to July 2016
Note: Includes Live Play for Sports
PROFILE OF 7-DAY PROGRAMME VIEWING
Individuals in PVR Homes

Source: TAM Ireland Ltd / Nielsen TAM
Based on % Series Average 000s, Individuals 4+ in Household with PVR, January to July 2016
Note: Includes Live Play for Sports
PROFILE OF 7-DAY PROGRAMME VIEWING
Adults 25-44

Source: TAM Ireland Ltd / Nielsen TAM
1 Based on % Series Average 000s, Adults 25-44, January to July 2016
Note: Includes Live Play for Sports
PROFILE OF 7-DAY PROGRAMME VIEWING
Men 25-44

Source: TAM Ireland Ltd / Nielsen TAM
1 Based on % Series Average 000s, Men 25-44, January to July 2016
Note: Includes Live Play for Sports
PROFILE OF 7-DAY PROGRAMME VIEWING
Women 25-44

Source: TAM Ireland Ltd / Nielsen TAM
1 Based on % Series Average 000s, Women 25-44, January to July 2016
Note: Includes Live Play for Sports
PROFILE OF 7-DAY PROGRAMME VIEWING
Adults ABC1

Current Affairs
News
Sports Tournament
Family Film
Film
Talk Show
Scripted Reality
Reality
Reality - Health and Fitness
Entertainment
Drama Series
Soap

Source: TAM Ireland Ltd / Nielsen TAM
\(^1\) Based on % Series Average 000s, Adults ABC1, January to July 2016
Note: Includes Live Play for Sports
TSV: PROGRAMMES VERSUS BREAKS
ROI COMMERCIAL CHANNELS
2016: All Day

Average TVR

<table>
<thead>
<tr>
<th></th>
<th>Adults 25-44</th>
<th>Adults ABC1</th>
<th>*Hskprs w/kids</th>
</tr>
</thead>
<tbody>
<tr>
<td>Live</td>
<td>5.47</td>
<td>5.79</td>
<td>6.61</td>
</tr>
<tr>
<td>Live + VOSDAL</td>
<td>6.28</td>
<td>6.44</td>
<td>7.47</td>
</tr>
<tr>
<td>Consolidated</td>
<td>6.74</td>
<td>6.83</td>
<td>7.98</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th>Adults 25-44</th>
<th>Adults ABC1</th>
<th>*Hskprs w/kids</th>
</tr>
</thead>
<tbody>
<tr>
<td>+15%</td>
<td></td>
<td>+11%</td>
<td>+13%</td>
</tr>
<tr>
<td>+23%</td>
<td></td>
<td>+18%</td>
<td>+21%</td>
</tr>
</tbody>
</table>

Average Break TVR

<table>
<thead>
<tr>
<th></th>
<th>Adults 25-44</th>
<th>Adults ABC1</th>
<th>*Hskprs w/kids</th>
</tr>
</thead>
<tbody>
<tr>
<td>Live</td>
<td>0.12</td>
<td>0.12</td>
<td>0.15</td>
</tr>
<tr>
<td>Live + VOSDAL</td>
<td>0.13</td>
<td>0.13</td>
<td>0.16</td>
</tr>
<tr>
<td>Consolidated</td>
<td>0.14</td>
<td>0.13</td>
<td>0.17</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th>Adults 25-44</th>
<th>Adults ABC1</th>
<th>*Hskprs w/kids</th>
</tr>
</thead>
<tbody>
<tr>
<td>+8%</td>
<td></td>
<td>+8%</td>
<td>+7%</td>
</tr>
<tr>
<td>+17%</td>
<td></td>
<td>+8%</td>
<td>+13%</td>
</tr>
</tbody>
</table>

Source: TAM Ireland Ltd / Nielsen TAM
LIVE SPORT

Average 000s Individuals: Minute-by-Minute Live v Time-Shift

Source: TAM Ireland Ltd / Nielsen TAM
NEWS
Average 000s Individuals: Minute-by-Minute Live v Time-Shift

Source: TAM Ireland Ltd / Nielsen TAM
CURRENT AFFAIRS – LIVE DEBATE
Average 000s Individuals: Minute-by-Minute Live v Time-Shift

Source: TAM Ireland Ltd / Nielsen TAM
MOVIE
Average 000s Individuals: Minute-by-Minute Live v Time-Shift

Source: TAM Ireland Ltd / Nielsen TAM
SOAP

Average 000s Individuals: Minute-by-Minute Live v Time-Shift

Source: TAM Ireland Ltd / Nielsen TAM
ENTERTAINMENT (TALENT)
Average 000s Individuals: Minute-by-Minute Live v Time-Shift

Source: TAM Ireland Ltd / Nielsen TAM
REALITY
Average 000s Individuals: Minute-by-Minute Live v Time-Shift

Source: TAM Ireland Ltd / Nielsen TAM
SCRIPTED REALITY
Average 000s Individuals: Minute-by-Minute Live v Time-Shift

Source: TAM Ireland Ltd / Nielsen TAM
DRAMA
Average 000s Individuals: Minute-by-Minute Live v Time-Shift

Source: TAM Ireland Ltd / Nielsen TAM
Key insights

1. 60% of Irish homes have a PVR

   At 93%, ownership is highest in Sky homes but Cable has seen PVR penetration grow from 76% to 84% in three years

2. 89% of viewing last year was live

   ... but live viewing is gradually accounting for less of overall viewing, particularly among Adults 25-44

3. Viewing profiles differ by genre

   ... and for some genres where time-shifting accounts for a significant proportion of the audience, break ratings are impacted
Viewing in Fast Forward
LAB TEST ON VIEWING COMMERCIALS IN FAST FORWARD
BACKGROUND AND METHODOLOGY

TAM Ireland commissioned B&A to conduct a lab test to understand the effect of viewing commercials in fast forward.

The test was conducted with 200 people viewing a commercial break consisting of 5 previously aired Irish commercials.

The 200 people were split into 4 groups:

• Cell A—were shown the commercials twice at normal speed.
• Cell B—Were shown the commercials once at normal speed and once in Fast Forward
• Cell C—Saw the commercials twice in fast forward only
• Cell D—were not shown any ads
• All were then questioned on 6 screen shots from each of the 5 commercials
AVERAGE PROMPTED AWARENESS (ALL IMAGES, ALL ADS)
BRANDED V UNBRANDED IMAGES – AVERAGE % PROMPTED RECALL

<table>
<thead>
<tr>
<th></th>
<th>Control (no ads) Cell D</th>
<th>2 x FF Cell C</th>
<th>1 x Normal &amp; 1 x FF Cell B</th>
<th>2 x Normal Cell A</th>
</tr>
</thead>
<tbody>
<tr>
<td>Average branded images % recall</td>
<td>62%</td>
<td>65%</td>
<td>88%</td>
<td>88%</td>
</tr>
<tr>
<td>Average unbranded images % recall</td>
<td>39%</td>
<td>43%</td>
<td>76%</td>
<td>71%</td>
</tr>
</tbody>
</table>

High awareness of branded images across all cells. Awareness of unbranded images almost doubles however amongst those shown the ads twice at Normal Speed, and those shown them at Normal Plus FF Speed.
BRANDED V UNBRANDED IMAGES – AVERAGE % NO. IMAGES RECALLED

<table>
<thead>
<tr>
<th></th>
<th>Control (no ads) Cell D</th>
<th>2 x FF Cell C</th>
<th>1 x Normal &amp; 1 x FF Cell B</th>
<th>2 x Normal Cell A</th>
</tr>
</thead>
<tbody>
<tr>
<td>Average no. branded images recalled</td>
<td>3.04</td>
<td>3.27</td>
<td>4.41</td>
<td>4.38</td>
</tr>
<tr>
<td>Average no. unbranded images recalled</td>
<td>9.67</td>
<td>10.69</td>
<td>19.05</td>
<td>20.14</td>
</tr>
</tbody>
</table>

Twice as many unbranded images are recalled by those exposed to ads at Normal Plus FF Speed, compared to those exposed to the ads in FF only, or no ads at all.
Those exposed to the ads at Normal Plus FF Speed (and Normal Speed twice) are much more likely to recall the branded images shown if they had been exposed to the ads previously – i.e. once I am exposed to an ad at Normal Speed, I am open to the effects of that ad when I see it in FF. This effect is entirely absent amongst those exposed to no ads, or the ads twice in FF.