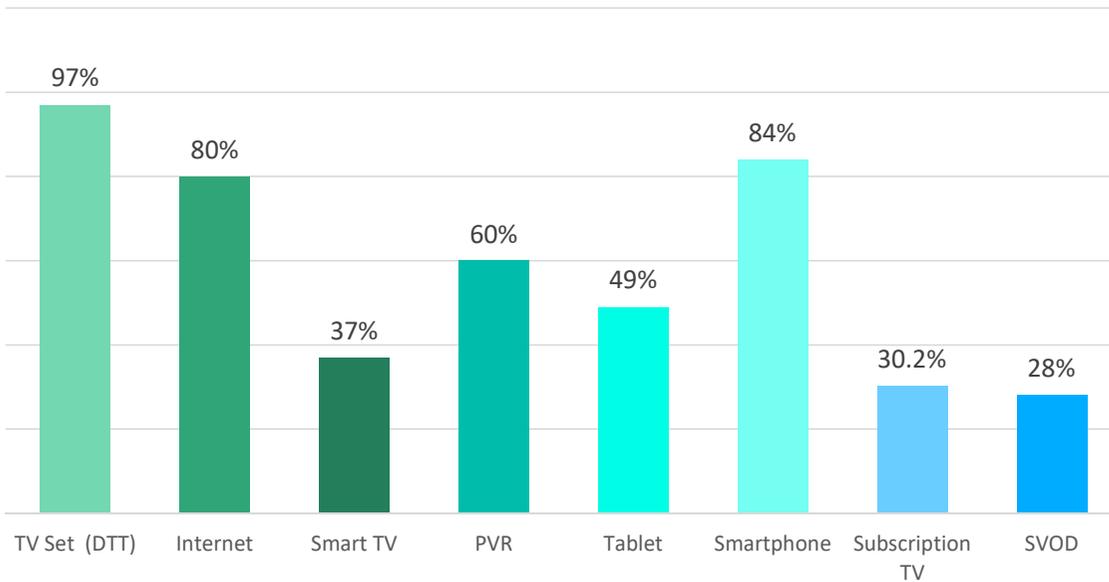


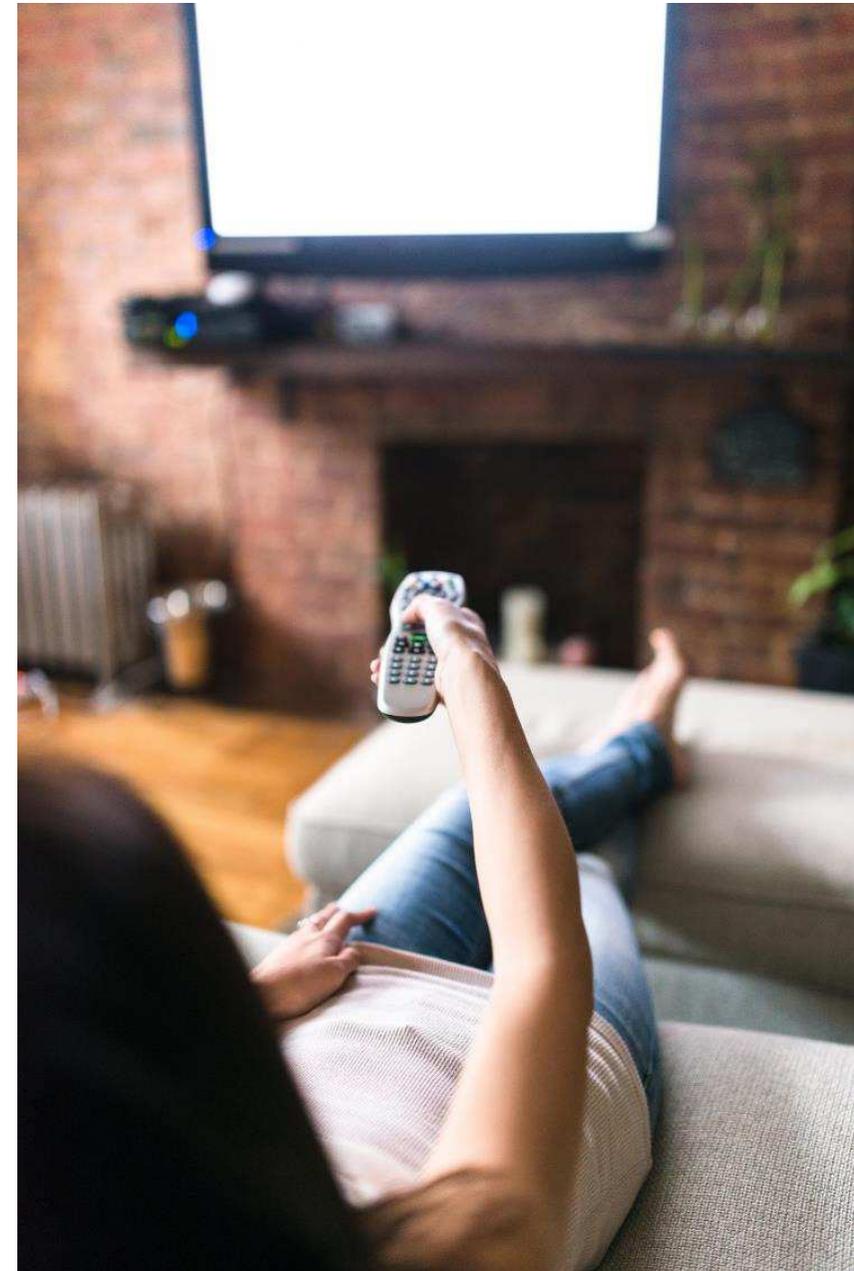
**“WATCHING TV ON
ANY DEVICE IS
OUR PREFERRED
ENTERTAINMENT
ACTIVITY”**

Devices per household on the rise

Australian homes today have a range of new devices and technologies to watch TV content with. The average Australian home now has 4.5 connected screens in addition to their TV sets, up from 3.9 four years ago.

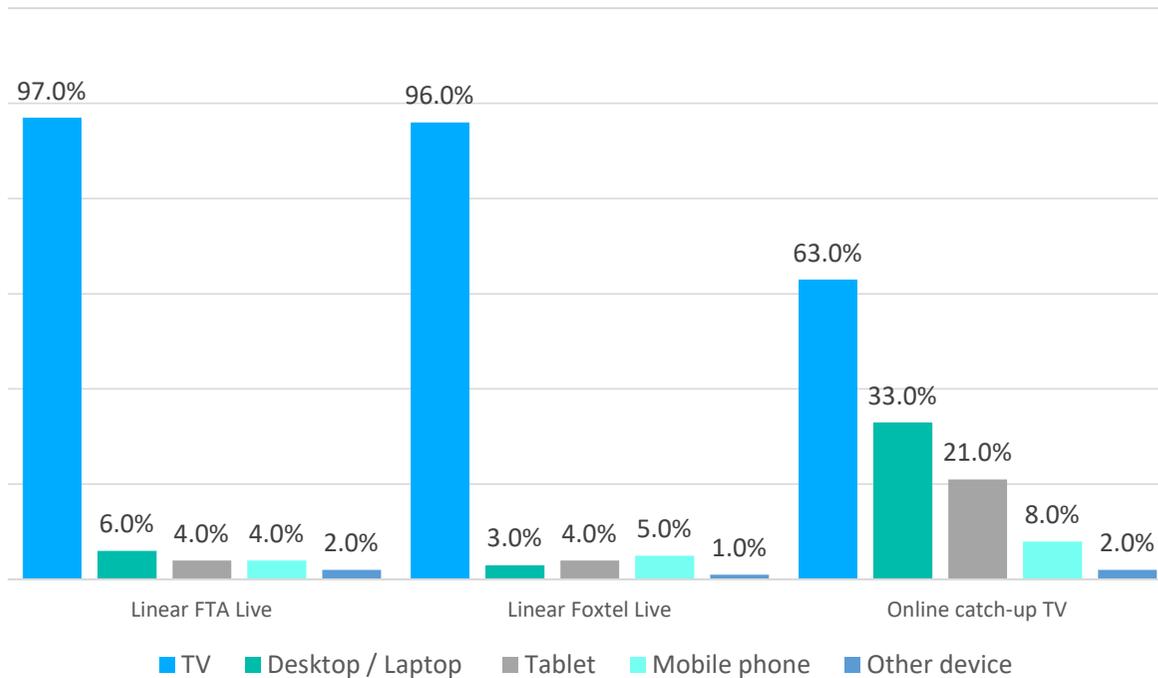


Source: TV set, internet, smart TV, PVR, tablet and smartphone sourced Australian Multi-Screen Report Q3 2016, subscription TV is the OzTAM national STU-STV and IDS-STV universe estimate (i.e., boxes in homes and internet accessed only homes) for Q1 2017, 28% SVOD (subscription video on demand includes Netflix, Stan, Presto, Quickflix, Foxtel Play and YouTube Red) sourced Roy Morgan September 2016.

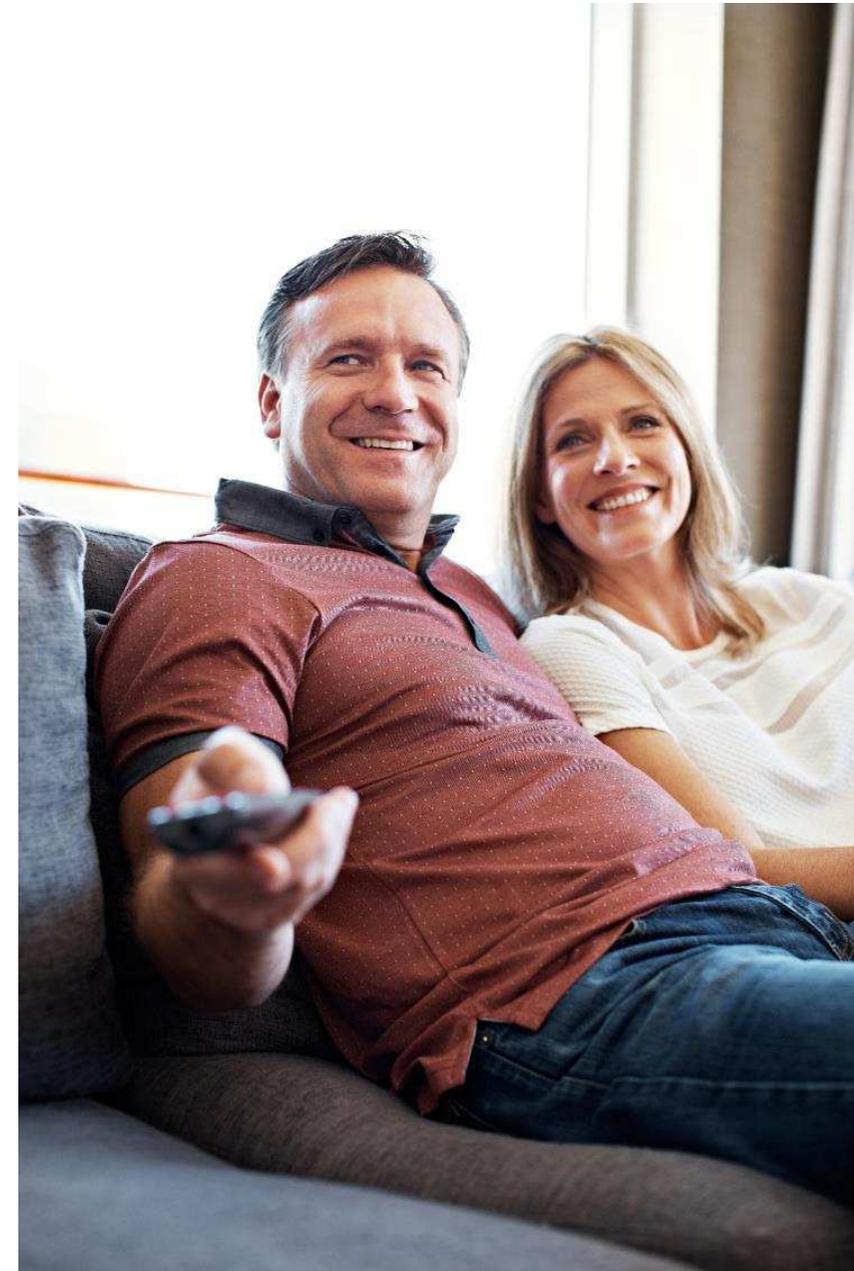


But the big screen still dominates

Despite the rise in the number of connected devices in the home, the television set remains the main way to watch linear TV and online catch-up TV.



Source: ACMA Communications Report 2015-2106. Online catch-up TV based on FTA programs



The big screen takeover



Source: News.com.au online article - Big-screen televisions are getting even bigger in Australia, with 65-inch TVs now commonplace, 16 May 2016.

- TVs today have become bigger, sharper, smarter and more connected than ever before.
- TV sets have almost tripled in size since the mid-90s, average screen sizes have doubled, with 65-inch TV sets the new must-have items for Australian households.
- Australia's top TV manufacturers are all focusing on bigger screens with 4K ultra high definition , HDR (high dynamic range), improved refresh rates and curved screens, all features and technologies that will only enhance the TV viewing experience.

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