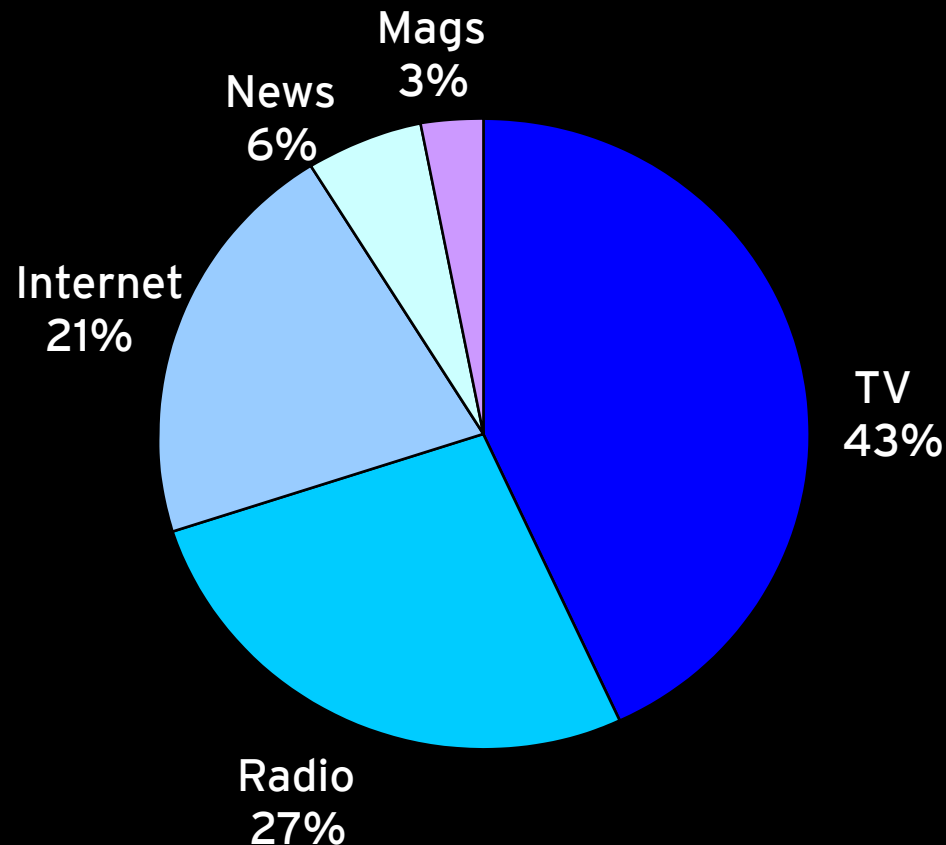

Television Viewing Over Time

Television remains the #1 media

Australians continue to spend significantly more time with TV than with any other media. According to Roy Morgan data, television accounts for a massive 43 per cent of people's time spent with media.

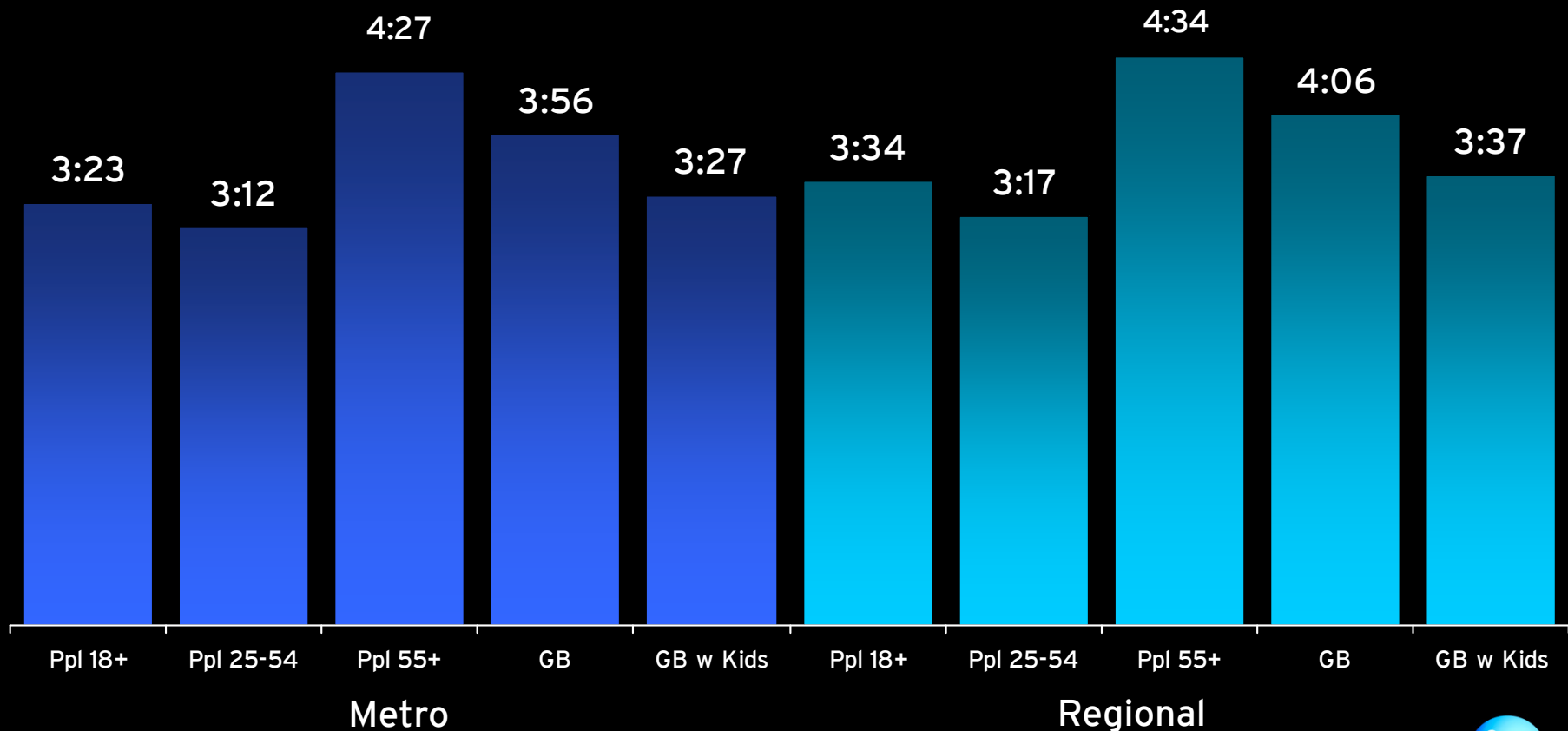
Weekly Time Spent With Media



Australians watch 3 to 5 hrs of TV a day

Official ratings data shows that Australians spend between 3 and 5 hours a day watching television. Grocery buyers and people aged 55+ watch the most TV.

Daily Time Spent Viewing - 2009 - By Demo



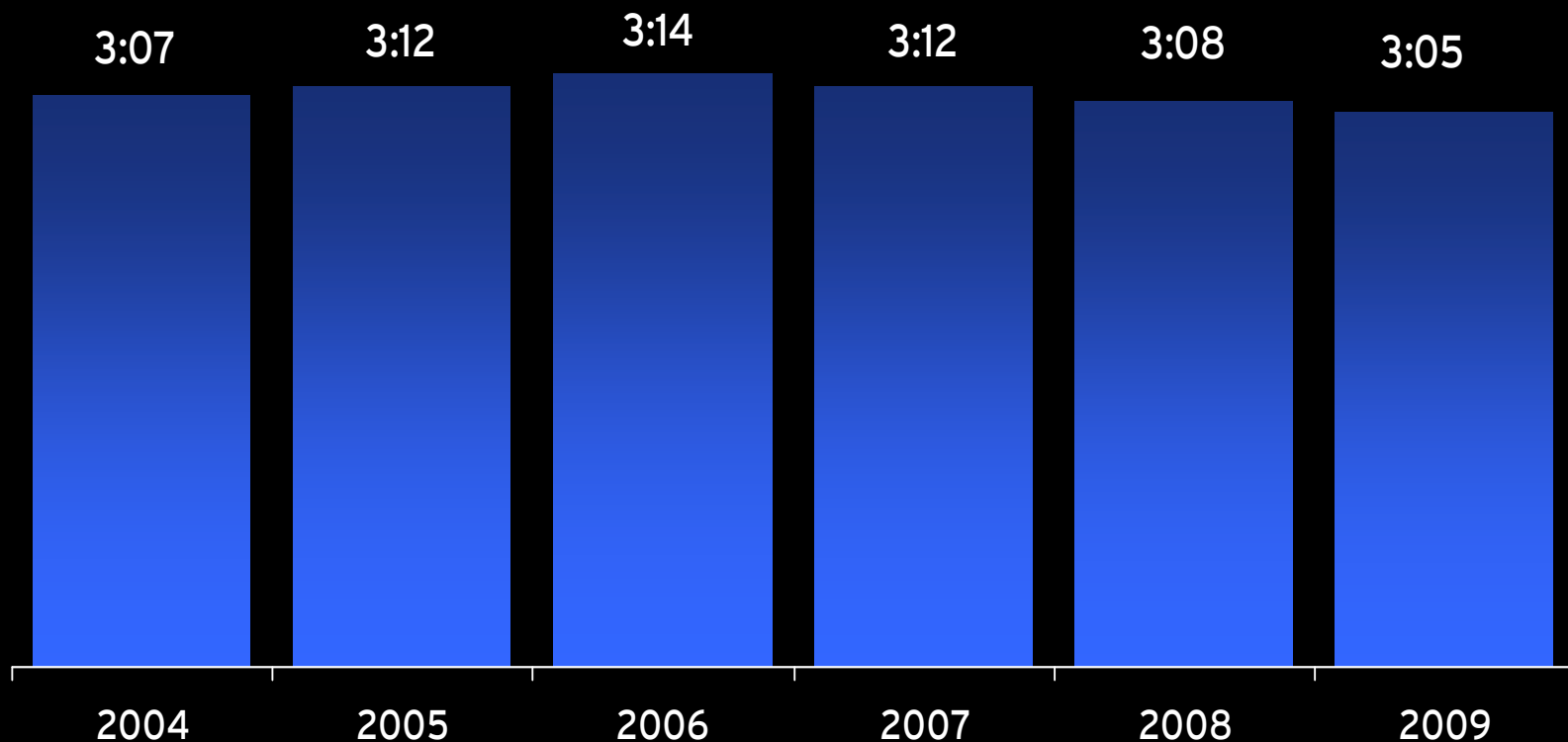
Source: OzTAM and RegionalTAM, 5 city metro, 4 aggregated markets (ex Tas), survey weeks 7-48 2009 ex Easter, total TV



Daily TV viewing has remained stable

Despite the plethora of media choices available to consumers today, Australians are still watching about the same amount of television as they did five years ago: 3 hours and 5 minutes per day in 2009, compared to 3 hours and 7 minutes in 2004.

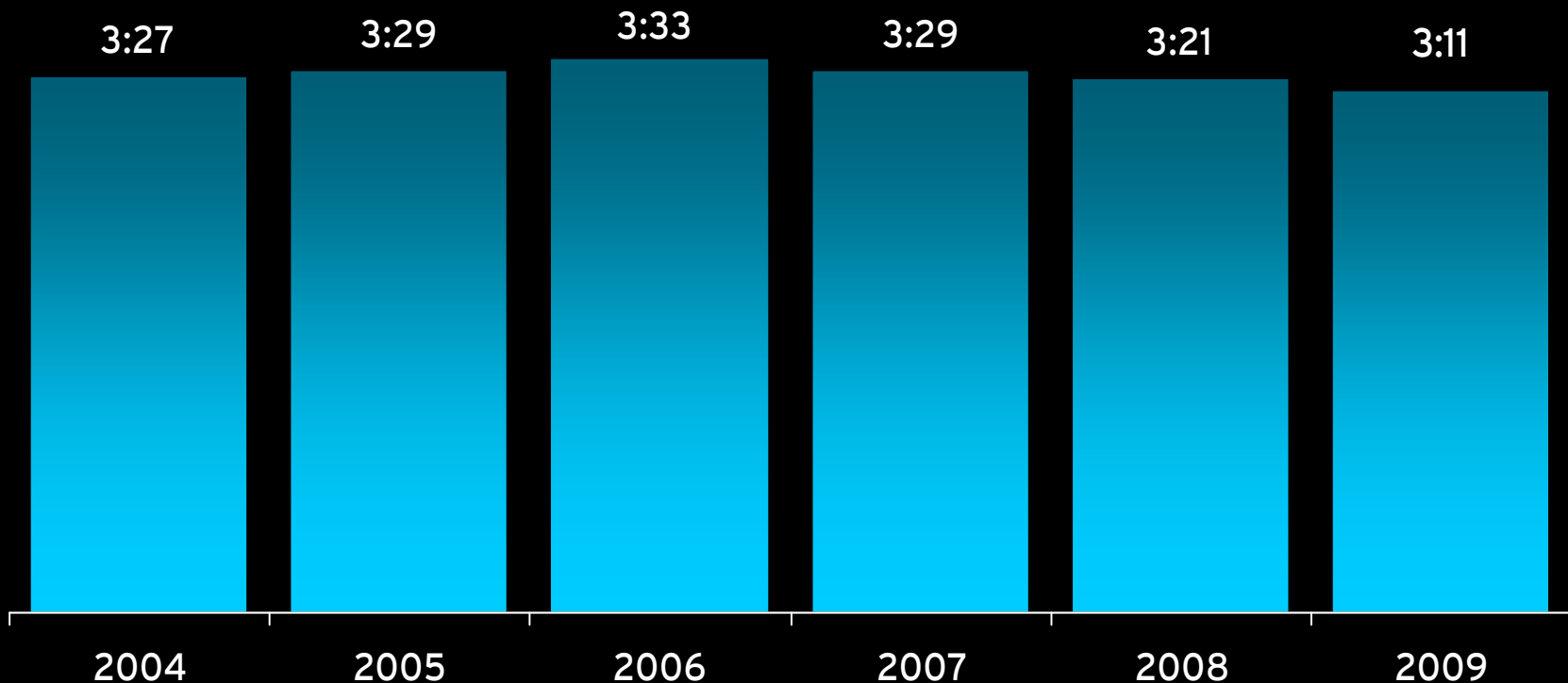
Daily Time Spent Viewing - YOY Comparison - Metro



Regional TV viewing is also stable

Regional television viewing has also remained stable over the last five years.

Daily Time Spent Viewing - YOY Comparison - Regional



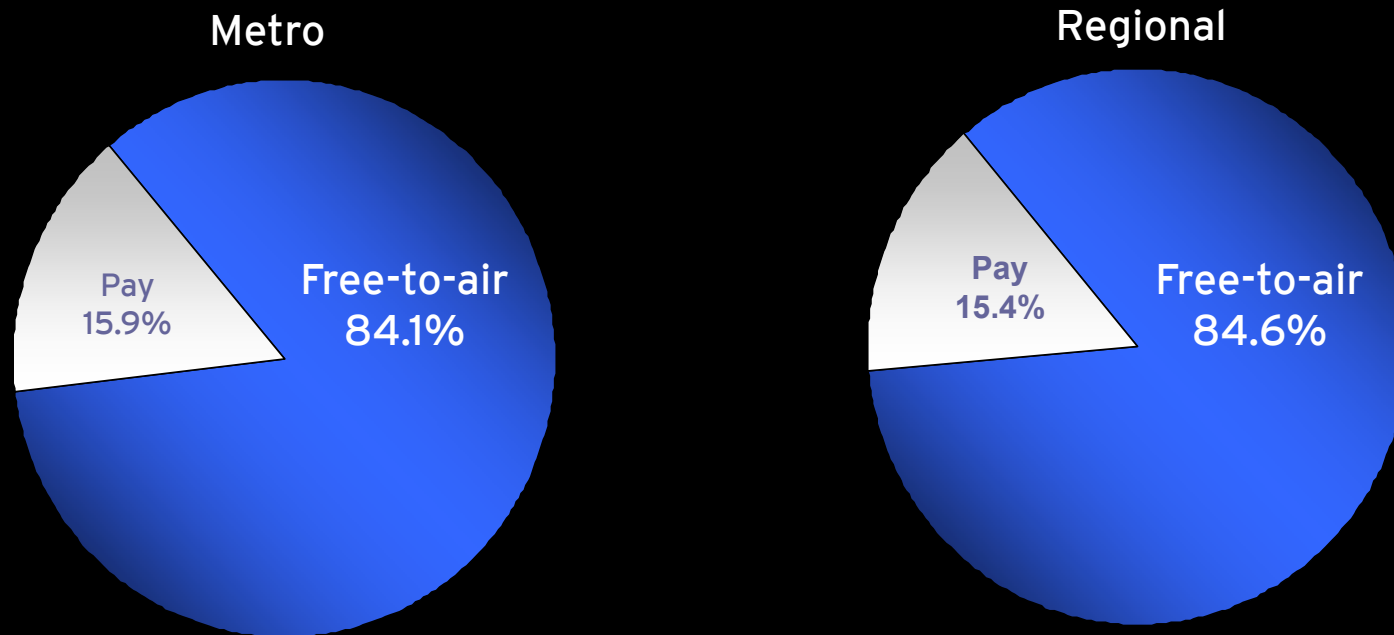
Source: RegionalTAM, 4 aggregated markets (ex Tas), survey years 2004 to 2009, total people, total TV



Free-to-air dominates viewing

Free-to-air television continues to dominate share of viewing, accounting for over three-quarters of all television viewing (2am - 2am). During the evening, free-to-air TV garners an 84.1 per cent share of viewing in metro markets, and an 84.6 per cent share in regional markets.

Share of Nightly Viewing 2009



International trends

A review of the viewing levels overseas shows television is continuing to dominate people's time, despite the myriad of entertainment and information options now available.

Americans spent a record average of five hours a day watching TV in the last quarter of 2008 and this year's Super Bowl drove the biggest single TV audience ever recorded.

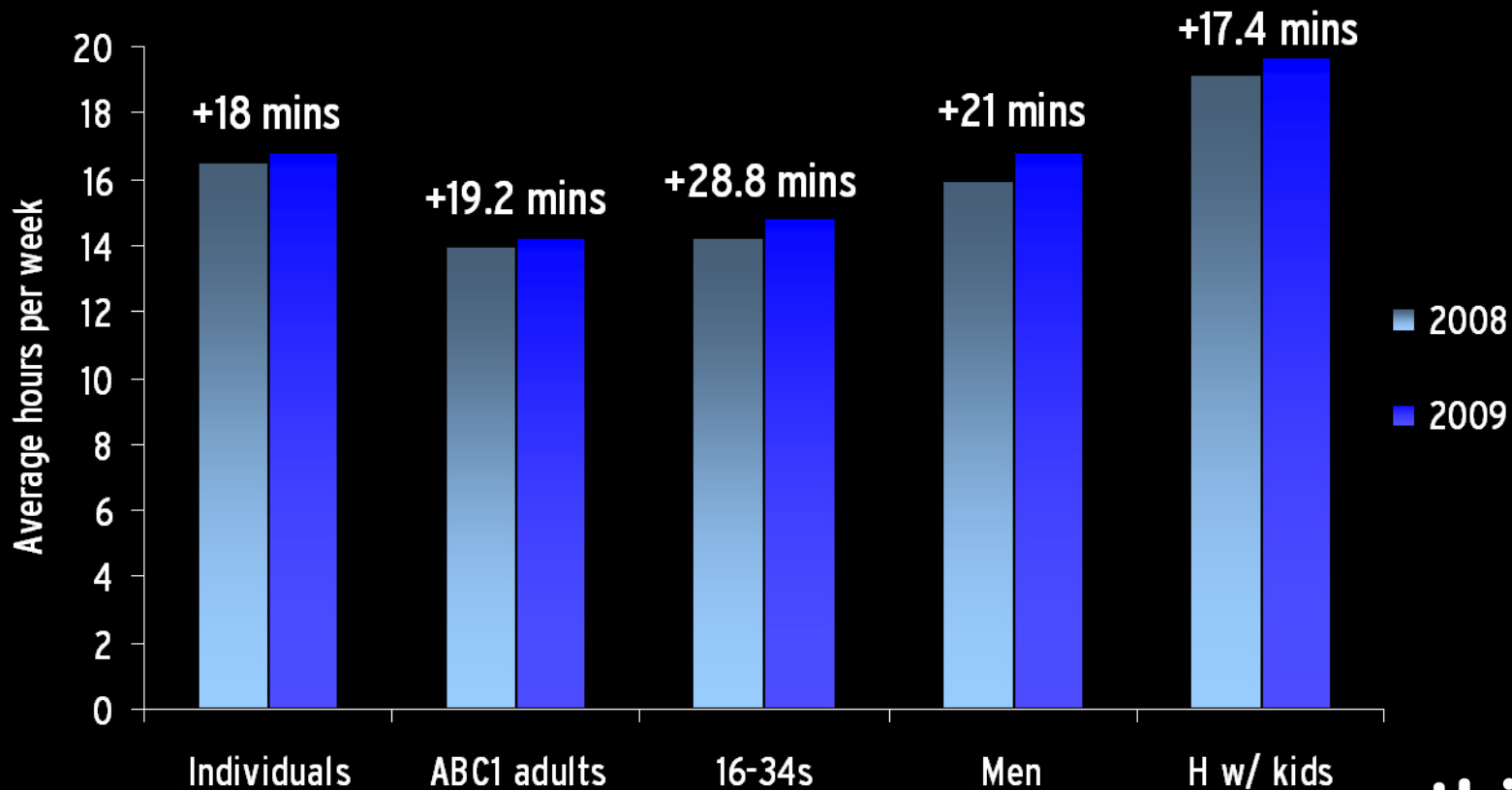
TV viewing in Canada has actually increased over the last five years. Canadians weekly TV consumption increased from 28 hours in 04/05 to 28.4 hours in 08/09.

And in the UK, television viewing hit record levels last year – thanks to Freeview and the increasing penetration of PVRs.

TV viewing increasing in the UK

Figures from BARB show people in the UK watched 26 hrs and 15 mins of broadcast TV per week, up 4.2 mins on 2008. The growth - seen across all age groups - was driven by viewing of commercial TV channels, which is up 18 mins per week year-on-year.

Commercial TV Viewing - UK - 2009



Conclusion

Watching television remains Australia's favourite pastime - people spend more time with TV than any other media.

Australians continue to watch around the same levels of TV as they did five years ago, with free-to-air television garnering the lion's share of viewing.

This trend can also be seen in the US, UK and Canada where viewing levels, in some instances, have hit record highs.

Despite the fact that the media landscape is evolving at a rapid pace, television continues to play a relevant and meaningful role in people's lives.