

NATIONAL SURVEY RESULTS

Survey 4, 2008

COMMERCIAL RADIO REACH AND TIME SPENT LISTENING

Monday - Sunday 5:30am - 12 midnight

Age	Reach (000s)	Reach (%)	TSL (hh:mm)
People 10-17	1,076	79.9%	9.29
People 18-24	1,076	77.2%	14.44
People 25-39	2,449	81.5%	16.05
People 40-54	2,159	78.5%	18.02
People 55+	2,007	65.1%	21.24
Grocery Buyers	3,781	75.3%	17.54
Occupation ABC1	3,934	78.2%	15.34

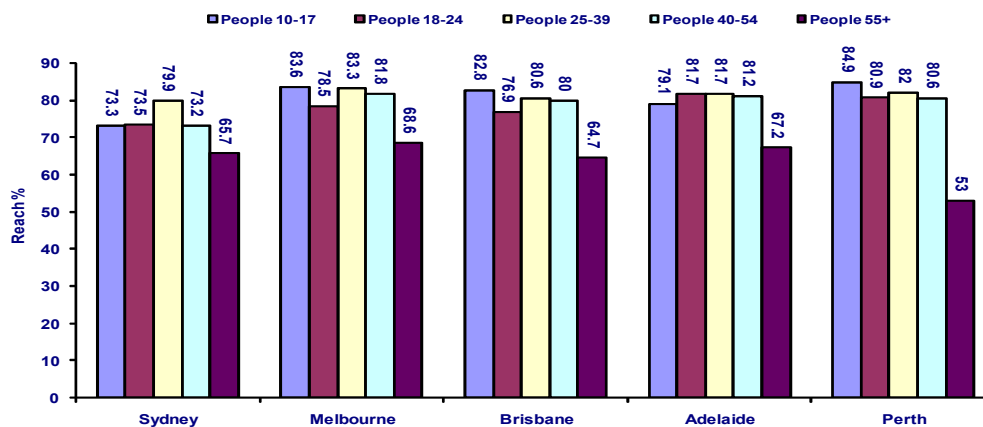
Podcasting and Mp3 Devices

- 44% of people 14yrs+ own an Mp3 device
- 35% of MP3 device owners have downloaded a podcast
- Mp3 device ownership is higher among young people
- 78% of people ages 14-17yrs own an Mp3 device
- 67% of people ages 18-24yrs own an Mp3 device
- 74% of people 14+ who own an Mp3 player listen to commercial radio.
- Of the 44% of Australians who own an Mp3 device, an average of 30% listen to 7 or more hours of commercial radio per week.

Source: Panorama Fused Metro Survey 3, (May 07– April 08), All people 14+yrs unless otherwise stated.

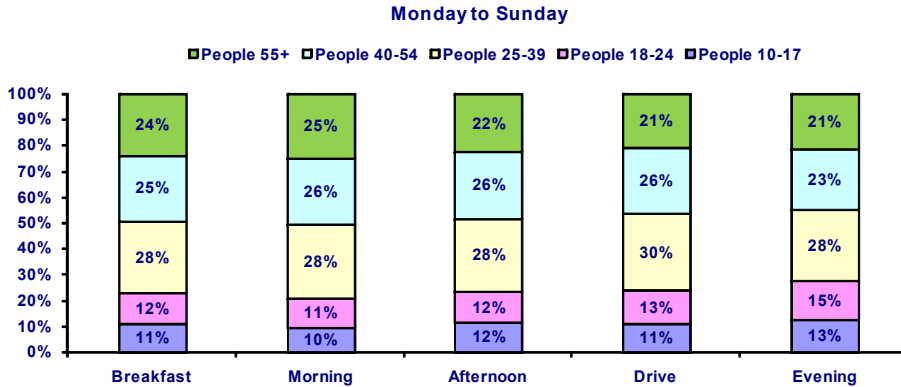
Commercial radio across the five metropolitan markets in Survey 4 2008 attracted weekly audiences of over 8.7 million of Australian's aged 10yrs+. **75.7%** of Australian's aged 10+yrs in Sydney, Melbourne, Brisbane, Adelaide and Perth **tuned into commercial radio each week**. Australian's spent an average **16hrs 48mins with commercial radio in an average week** across the survey period, or 2hrs 24mins a day. Reach across the 5 capital cities **peaked among people 10-17yrs and 25-39yrs**, with **79.9%** and **81.5%** respectively, tuning in to commercial radio weekly. Additionally, **over 77% of people 18-24yrs** tuned into commercial radio each week. Among people 55+ commercial radio reach was over 65%. **People 55yrs+ spent the longest time with commercial radio each week**. Time spent listening(TSL among the age group was up 33mins from the same period last year to **21hrs 24mins** each week, or 3hrs3mins a day. TSL among people **40-54yrs was 18hrs 02mins each week**. Highlights from Sydney include a reach of **almost 80% among people 25-39yrs**. **Melbourne delivered the highest national reach, with 78.5% of people 10+yrs tuning in each week**. This strong average reach in Melbourne is a reflection of over 83% of people 10-17yrs choosing to listen to commercial radio each week. Additionally, TSL among people 55yrs+ was strong in Melbourne, reaching **21hrs 49mins each week**; However Sydney TSL among people 55yrs+ was the highest, reaching **23hrs 4mins of listening each week** by this age group. **In Brisbane, almost 83% of people 10-17yrs tuned in to commercial radio each week, and 80.6% of people 25-39yrs tuned in each week**. **Adelaide had the highest TSL of all markets, with the 76.9% of people 10+ listening on average for 16hrs 47mins each week**. Finally in Perth, commercial radio performed strongly against most age groups, with **over 80% of people aged 10-54 tuning in each week**. **Perth led reach among people 10-17yrs, with 84.9% of that age group listening each week**.

COMMERCIAL RADIO REACH BY MARKET AND DEMOGRAPHIC



Commercial radio remains a main medium of choice among Australian's, providing up to date news, entertainment and information to core audience groups each week across each of the 5 metropolitan markets. In Survey 4 2008, commercial radio displayed increases in reach across several key demographics compared to the same survey in 2007. In **Sydney**, reach among people **25-39yrs** increased 2% to **almost 80% weekly** compared to the same survey last year. In **Melbourne**, where **78.5% of people 10+ tune in to commercial radio weekly**, reach grew among people **25-39yrs to 83.3%**, up **1.6%** compared to the same survey last year. In **Brisbane**, reach among all people 55yrs+ jumped slightly **64.7%**. In **Adelaide**, reach among **people 40-54yrs** across Survey 4 2008 as **81.2%** of the age group tuning in each week. Commercial radio listening in **Perth was strongest among people all people 10-17yrs with commercial radio reach almost 85%**. Commercial Radio listeners in Perth showed a consistent strong reach of **80% and above** among all people 10-54yrs.

COMMERCIAL RADIO REACH BY TIME OF DAY

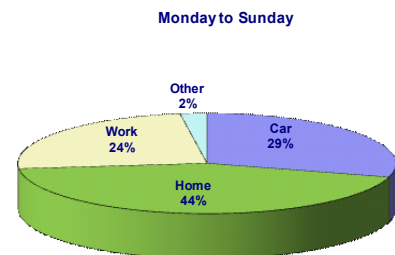


Commercial radio targets particular listening groups by daypart, allowing advertisers to tailor their message by time of day to best reach their audience. Analysis of listening to each session Monday to Sunday across Survey 4 2008 shows that older audiences tune in larger proportions in the early part of the day, people of working age listen heavily during business hours and youth listen in greater proportions as the day progresses into evening. During the **breakfast timeslot 25%** of listeners are **40-54yrs** and **28%** are **25-39yrs**. Across the **morning**, people **55+yrs** represent **25%** of the total audience and people **25-39yrs** another

28%. **Afternoon** sees an increase in proportion of younger listeners tuning in. People **10-17yrs** comprise **12%** of the audience and increases to **13%** by the evening. Over one quarter, or **28%**, of the total commercial radio audience during **afternoons** are people **25-39yrs**. During the drive session, people **25-39yrs** make up **30%** of the listening audience and people **18-24yrs** **13%**. Similarly in the **evening**, people **18-24yrs** represent **15%** of listeners and people **55+yrs** represent **21%** of listeners.

COMMERCIAL RADIO PLACE OF LISTENING

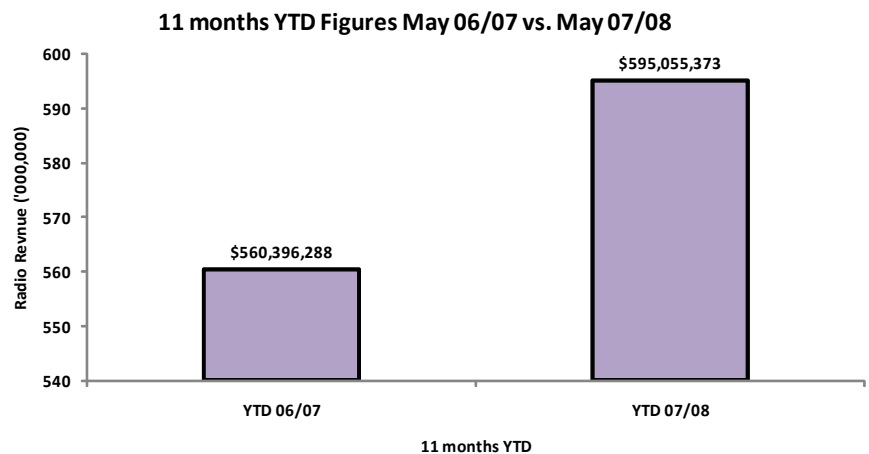
Commercial radio is a portable medium, travelling with consumers wherever their day takes them and impacting them with timely and relevant messages. Across Survey 4 2008, **at home remained the place that the majority of commercial radio listening occurred (44%)**, remaining stable compared to the same survey last year. **In car listening** represents the second most popular location to listen to commercial radio, **with 29%** of all listening occurring in the car, **up 1%** from last year. At work listening then makes up almost an additional **quarter of all listening (24%)** and Other listening represents 2%.



COMMERCIAL RADIO REVENUE

Metropolitan Commercial Radio Revenue Figures

Advertising revenue at metropolitan commercial radio stations in the month of May 2008 were **\$54.8million**. During the **eleven months** from July 2007 to May 2008, metropolitan radio advertising revenue was **up 6.18%** to **\$595 million** compared with the same period last year. **Perth** was the top performing of the five capital city radio markets during the financial year, with ad revenue up **18.84%** to \$75.8 million, followed by **Brisbane**, which grew by **11.5%** to \$95.2 million. **Adelaide** rose by **6.49%** to \$56.4 million, while ad revenue for **Melbourne** stations increased by **7.02%** to \$168.7 million. **Sydney** was down 0.8% to **\$198.8 million** over the 11 months.



Source: PricewaterhouseCoopers May 2007.

Source: Nielsen Media, Average Capital Cities - Sydney, Melbourne, Brisbane, Perth and Adelaide. Survey 4, 2008, Monday - Sunday 5:30am - 12 midnight, and people aged 10+yrs unless otherwise specified. Survey Period: Survey 4, 2008: 4 May to 7 June 2008.

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