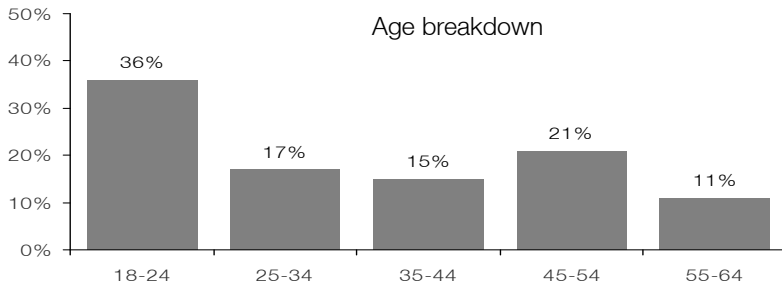


Shopper Profile 2.0 study – November 2009

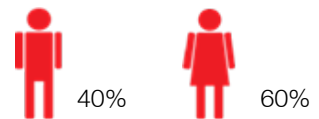
The EYE Shopper Profile 2.0 study seeks to take a fresh look at how the psychographics of mall Shoppers have changed at this point in the recession. Our insights, conducted in conjunction with Survey Sampling Inc. (SSI), touch on several key components from the EYE Shopper Profile by Arbitron and also on the effect of media, the lure of sales and the views of our Shoppers this holiday season.

For more information on the EYE Shopper Profile by Arbitron please visit www.eyecorp.com/shopperprofile.

Basic demographics¹



Gender split



Number of Mall Visits Per Month	Percentage
1-2 times	59%
3-4 times	29%
5-6 times	8%
7 or more times	3%

Time Spent in the Mall	Percentage
30 minutes or less	8%
31 minutes – 1 hour	31%
1 hour – 2 hours	44%
More than 2 hours	16%

Shopping habits in a new economy

Even in a down economy, 24% of EYE Shoppers reported that their shopping habits remained the same as last year and 10% of Shoppers reported spending more.

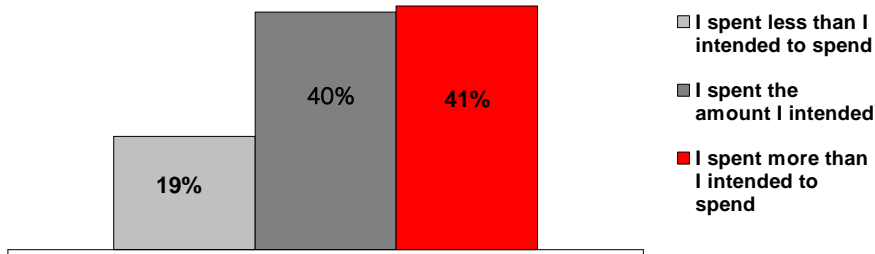
- Based on actual verbatim, a subset of Shoppers such as those experiencing major life events like a move, starting school or marriage, find themselves spending more.
- People are still visiting the mall:
 - 41% of Shoppers are visiting the mall 3 or more times each month
 - 60% of Shoppers spend over an hour at the mall each visit.
- 57% of EYE Shoppers have children under the age of 18 living in their household.

Insights

Shopper Profile 2.0

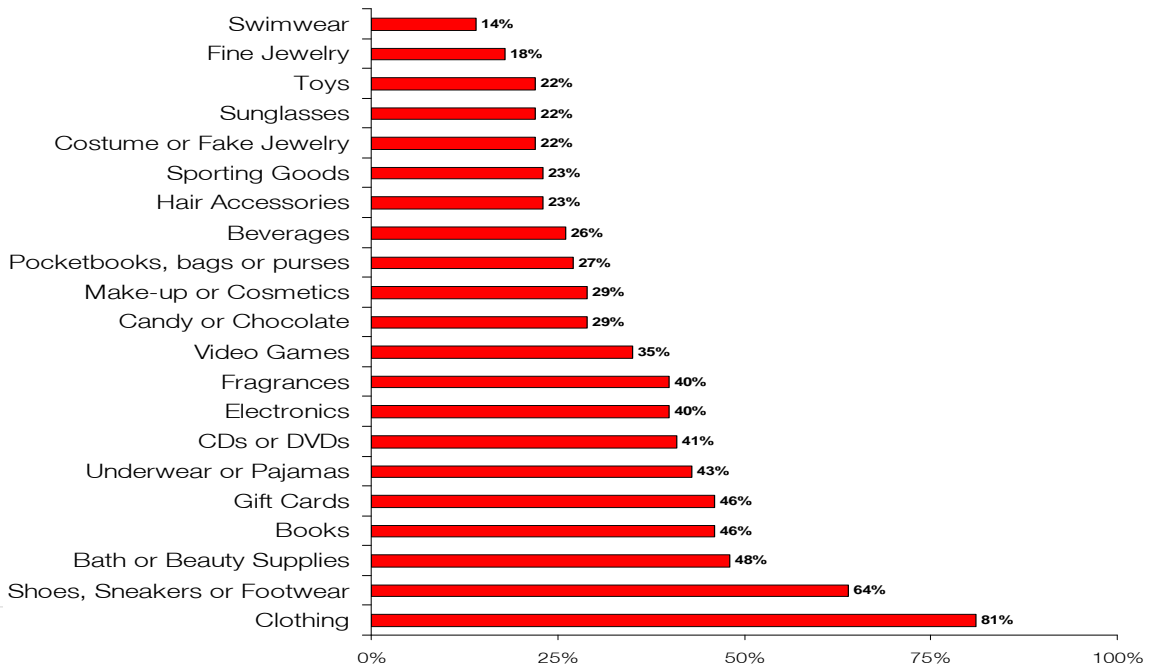
When in the mall environment, in particular, 41% of EYE Shoppers report spending more than they intended.

During your last mall visit, did you spend ... ?



- Most EYE Shoppers are shopping at department stores (78%), apparel stores (57%), footwear stores (53%) and electronics stores (44%).
- EYE Shoppers visit department stores: Macy's (31%), JC Penney (20%), Sears (20%).
- On the given day of a mall visit Shoppers also frequent the bank (45%), big box stores such as Target, Wal-Mart, Kmart and BJ's (55%) and grocery stores (42%), making the mall an advantageous venue to advertise products and services sold at these locations.

Items Plan to Buy in the Mall (Next 12 Months)



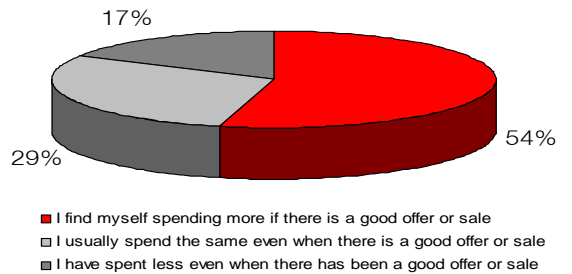
The “Sale” effect

Consumers are very receptive to good sales and offers in this new economy.

- 58% of Shoppers are willing to spend more if presented with a good sale or offer.
- Similar to findings in the original Shopper Profile, 54% of Shoppers said that “they can’t resist a good sale or offer”.

By reminding consumers of upcoming sales or offers, advertisers are more likely to drive additional traffic to their stores.

The Influence of Sales and Offers



Media effect on Purchase Decisions

Although mall advertising influences purchase decisions less than television and the internet, which came in around 60% and newspapers and magazines, which came in at 40%, mall advertising does influence Shoppers more than radio and all other Outdoor advertising including billboards, cinema, bus stops, buses and telephone kiosks/booths.

Nearly 30% of those interviewed stated that mall advertising influences their purchase decisions.

Those Shoppers who reported that mall advertising influences their purchase decisions have the following characteristics:

- 61% find themselves spending more if there is a good sale or offer
- 43% spend more than the amount intended at the mall
- influence or make many household purchase/service decisions.

Coupled with the fact that Outdoor has the lowest CPM of all media formats, mall advertising provides an **efficient and cost-effective** means to advertise your message.

There are many ways companies have advertised their products, services or brands to you. Which of the following influences your purchase decision?

Advertising Medium	
Television	62%
Internet	59%
Mail	47%
Newspapers and Magazines*	40%
Shopping Malls	29%
Radio	15%
Outdoor Billboards	14%
Cinema	12%
Bus Stop	6%
Buses	5%
Telephone Booth	3%

*Newspapers (40%), Magazines (39%)

Insights

Shopper Profile 2.0

Holiday 2009

According to NRF's Black Friday shopping survey, conducted by BIGresearch, 195 million shoppers visited stores and websites over Black Friday weekend, up from 172 million last year. However, the average spending over the weekend dropped to \$343.31 per person from \$372.57 a year ago, making it critical to influence share of spend at the point-of-purchase.

EYE Shoppers will follow this trend as many, will also lower their spend this holiday season. However, there is a level of optimism filtering through as 42% of EYE Shoppers prepare to spend more or the same as last year. Even more promising is the 12% of EYE Shoppers who say they will spend more this holiday season.

Given a great sale or offer 44% of EYE Shoppers are willing to spend more during the holidays.



Methodology

Survey Sampling Inc. (SSI) conducted 380 online surveys on behalf of EYE with a random sample of adults aged 18 to 64 between November 1 and November 6, 2009. All participants must have visited at least one of the 250 EYE malls in the US in the past month. Adults who work at an EYE mall were not allowed to participate in the study.

- Length of questionnaire: ~ 20 minutes
- Number of participants: 380

About EYE

The EYE portfolio in the US encompasses over 3,500 panels in 250 shopping malls across the country, with more than half the portfolio sitting in the top 30 DMAs. EYE's digital network includes nine malls across the country and consists of 69 digital units.

EYE has offices in and operates Out-of-Home media businesses in Australia, New Zealand, Indonesia, Singapore, the United Kingdom and the United States of America. Eye Corp Pty Ltd is a wholly owned subsidiary of Ten Network Holdings Limited, a publicly listed company, which operates Australia's TEN television network.

Contact

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