

DEMAND FOR HOME AIR CONDITIONING CONTINUES

Over 820,000 potential sales in the next 12 months

Despite environment concerns creature comforts are influencing over 820,000 Australians to purchase an air conditioner in the next 12 months.

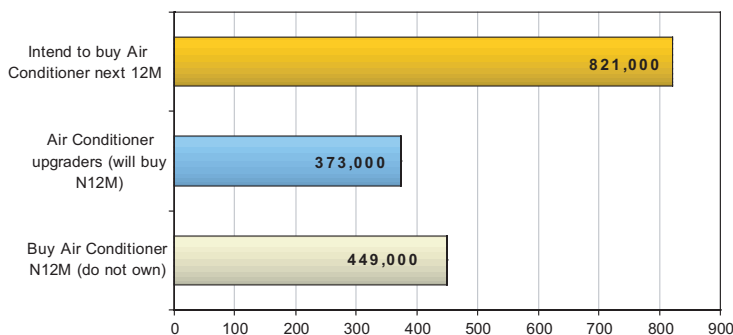
“Our latest findings indicate that penetration figures have climbed over 60 per cent, with 4.9 per cent intending to replace or buy an air conditioner in the next 12 months,” said Nielsen Panorama director, Simone Bryant.

TABLE 1: Current owners and intending buyers of home air-conditioners next 12 months

Home Equity Status by own or intend to buy Air Conditioner (in 000's)	Total All People 18+	Air Conditioner In Home	Intend to buy in next 12M	Upgraders (will buy N12M)	Buy but do not currently own
Total	16658	10149	821	373	449
Own Home	5848	3940	239	129	110
Have a Mortgage	5491	3742	311	155	156
Renting	4897	2241	253	84	169
Other	422	226	18	4	14

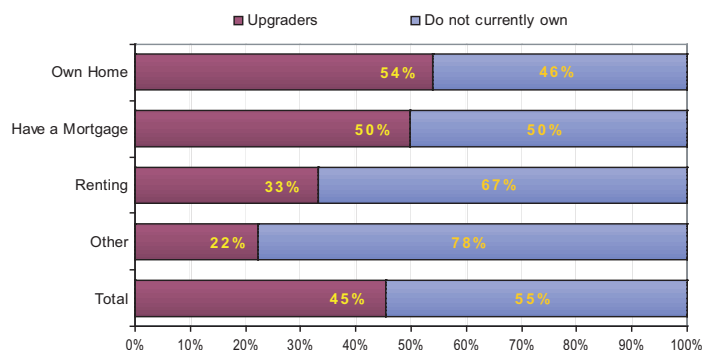
Source: Nielsen Panorama (Apr '08-Mar '09)

TABLE 2: Intending air conditioner purchasers by Upgraders and Non Owners



Source: Nielsen Panorama (1.19million people 18+)

TABLE 3: Intending air conditioner buyers and home equity



Source: Nielsen Panorama (Apr '08 to Mar '09)

TABLE 3: Preferences for retailers skewed heavily among those intending air conditioner purchasers

Preferred Retailers for Air Conditioner Owners and Purchasers Next 12 months	% Air Conditioner In Home	% Intend to buy next 12M
The Good Guys	65.7	66.8
Harvey Norman	56.1	60.7
Retravision	46.5	51.1
Betta Electrical	28.1	32.9
Clive Peeters	16.5	21.2
Myer	14.4	17.2
Bing Lee	12.9	14.9
Other	11.5	13
David Jones	6.7	8.6
Domayne	7.4	8.4
Chandlers	4.4	7.5
Clive Anthonys	4.4	7.5

Source: Nielsen Panorama (Apr. '08-Mar '09)

Targeting intenders by home equity – up-graders and new-to-air-conditioning

“Of the 822,000 consumers intending to buy an air-conditioner, 67 per cent either own their home outright or have a mortgage. The up-graders and new-to-air-conditioners ratio is relatively equal.

This presents two communications opportunities. The first is to up sell those up-graders who are in the market for a more efficient and effective replacement. Secondly, those new to air conditioners will be relying on information and retailer expertise to support their product purchase decision,” she added.

“Additionally, a substantial 31 per cent of intending buyers are renting and incidence of first time air conditioner buyers has reached 67 per cent. So, this consumer segment is more likely to seek a low cost alternative, with true portability.”

“Marketers and manufacturers can align Panorama’s media consumption trends data with consumer preference insights to match intending purchaser groups with preferred retailers. This type of matching is ideal across a broad range of electrical appliances; from brown and white goods to computing and home entertainment products,” she said.

About Nielsen Panorama

Panorama data is based on continuous interviews across Australia and released 10 times per year, to coincide with TV and Radio audience ratings. For more information contact Simone Bryant on (02) 8873 7736.

About The Nielsen Company

Nielsen is a global information and media company with leading market positions in marketing and consumer information, television and other media measurement, online intelligence, mobile measurement, trade shows and business publications. The privately held company is active in more than 100 countries, with headquarters in New York, USA. For more information, please visit, www.nielsen.com