



	<u>Dallas-Fort Worth DMA</u>		<u>Dallas-Fort Worth-Arlington CBSA</u>	
	<u>#</u>	<u>U.S. Rank</u>	<u>#</u>	<u>U.S. Rank</u>
Households	2,413,400	#7	2,171,100	#5
Population	6,655,400	#6	6,007,700	#4
EBI	\$144.2 Billion	#8	\$133.7 Billion	#6
Retail Sales	\$101.4 Billion	#8	\$94.0 Billion	#6

Market Highlights

- The Dallas-Fort. Worth DMA is the 6th-most populous DMA in the U.S., and has more population than 38 states; located in the center of the U.S., it has easy access to every major U.S. city within 4 hours flying time; distribution center of the Southwest, and the nation's largest inland port
- Dallas and Fort Worth are ranked as two of the most affordable major metro markets in cost of living in the U.S; the overall composite score for Dallas is 91.9% and Fort Worth 87.2%, based on costs of groceries, housing, utilities, transportation, & health (*ACCRA Cost of Living, '08, 1st Qtr*)
- Of the top 10 DMAs, Dallas/Fort Worth is ranked in 5-year % projection as: #2 in population (+9.2%), in households (+8.9%), and #3 in EBI (+19.0%) (*Demographics USA, 2007*)
- DFW added nearly 67,000 new jobs from 4/07 to 4/08, ranked as the #2-fastest metro for job growth (*U.S. Census Bureau; BLS*)
- Dallas and Fort Worth metros have two of the highest rankings in U.S. residential real estate investing: Dallas #1, and Fort Worth #5 (*HomeVestors of America, 8/08*)
- Largest corporate HQ DMA concentration in the U.S. (including areas of Dallas, Ft. Worth, Arlington, Plano, Irving, and Woodlands), with 23 top Fortune 500 firms, including: Exxon, AMR, Electronic Data Systems, Kimberly-Clark, Fluor, Anadarko Petroleum, Burlington Northern Santa Fe, Centex, Texas Instruments, Dean Foods, D.R. Horton, Southwest Airlines, Tenet Healthcare, Commercial Metals, Energy Future Holdings, Energy Transfer Equity, Celanese, Atmos Energy, Affiliated Computer Systems, Blockbuster, XTO Energy, and Holly (*4/08*)
- A leader in life sciences, with one of the best locations for quality transportation, low cost of doing business (including wages), a diverse and talented workforce, and a strong research presence; the accelerates the region's growth in the area; there are over 40 universities and facilities conducting research in the industry, and there are over 100 life sciences firms in the area
- DFW Int'l Airport is the #4 "Busiest U.S. Airport in 2007" with nearly 60 million passengers; non-stop flights to 173 int'l and domestic destinations, with \$16.6 billion in total economic output for '07; a major hub for air & ground transportation; over the few years, it is undergoing a \$2.7 billion capital development program (*ACI, 3/08; DFW Airport*): #1 "Top performing U.S. airport" (*Airport Service Quality Survey, '07*); other airports in the area: Dallas Love Field; Alliance Airport; Ft. Worth's Meacham Int'l Airport
- DFW has 6 major league sports teams: Cowboys (NFL), Rangers (MLB), Stars (NHL), Mavericks (NBA), Desperados (AFL), FC Major League Soccer; ranked as the #3 sports city (*SportingNews, 8/07*)
- Dallas/Ft. Worth is ranked:
 - #1 "Top metro in largest numeric population gain," an increase of 162,000 (*U.S. Census, 3/08, 2006-2007*)
 - #1 "Best housing market," adding well-paying jobs at twice the national rate (*Business 2.0/CNN Money, '07*)
 - #1 "Most logistics friendly city" (*Logistics Today, 4/08*)
 - #1 "Top metro (of 30) in home affordability" for median HHI, taxes, % of HH payment (*bizjournals 3/08*)
 - #4 "Best city with least-costly place to do business" (*KPMG LLP, 3/08*)
 - #5 "Best high-tech city overall;" #1 in communications equipment; #2 in telecommunications & internet services; #4 in semiconductor manufacturing; #5 in software publishing (*AeA Cybercities, 2008*)
 - #6 "Best city for recent college grads" based on entry-level jobs, cost of apartments (*Apartment.com, 4/08*)
 - #6 "Top metro by number of corporate facility projects (73)" (*Site Selection, 3/08*)
 - #7 "Top metro in economic strength" based on job growth & earnings; up from #22 in '07 (*Policom, '08*)

Source: Demographics USA, 2007



	<u>Circulation</u>		<u>DMA Readership</u>	
	<u>Daily</u>	<u>Sunday</u>	<u>Daily</u>	<u>Sunday</u>
Total	617,286	868,255	DMA Adults	1,476,069
DMA	585,091	830,285	College Grad+	546,454
Metro	557,890	792,307	Prof/Mgr/Business/Finc'l	483,771
			Average HH Income	\$106,801
			Total DMA Reader Income	\$157.6 Billion
				\$211.4 Billion

Market Highlights

- Newspaper is the medium that reaches the most upscale, high-end consumers in the Dallas/Ft. Worth market. Heavy newspaper readers index far above heavy users of both TV and radio among the most valuable prospects in the Dallas/Ft. Worth DMA:

	<i>Newspaper Quintile 1</i>	<i>Radio Quintile 1</i>	<i>TV Quintile 1</i>		<i>Newspaper Quintile 1</i>	<i>Radio Quintile 1</i>	<i>TV Quintile 1</i>
Home value \$300M+	191	120	83	Post grad/degree+	162	93	87
Own foreign lux vehicle	174	75	73	Took a cruise	157	101	87
Have money mkt acc't	165	99	92	Use financial planner	156	101	98

- The Dallas Morning News/Fort Worth Star-Telegram combination accounts for 21% daily and 25% Sunday of all newspaper circulation in the state
- Daily readers of the Dallas Morning News/Fort Worth Star-Telegram combination have a 19% higher HHI than the DMA average—a difference of over \$16,800; and on Sunday, readers have a 14% higher HHI (over \$12,600 more) than the DMA average
- The Dallas Morning News/Fort Worth Star-Telegram combination provides far greater coverage of metro adults than AM drive time radio, or even 1 prime time TV spot each from ABC, CBS, FOX, NBC

	<i>% Metro Adults</i>		<i>% Metro Adults</i>
Daily Dallas Mrng News/FW Star-Telegram	32%	AM Drive Time Radio (avg ¼ hr, 52 stations)	21%
Sun. Dallas Mrng News/FW Star-Telegram	44%	Prime Time TV: ABC, CBS, FOX, & NBC	15%
- Over 84% adults who read a newspaper in metro Dallas/Fort Worth/Arlington area turn to The Dallas Morning News/Fort Worth Star-Telegram combination daily, and 96% on Sunday
- On an average weekday, the Dallas Morning News/Fort Worth Star-Telegram combination reaches over 557,890 metro households – over 4½ times more households reached by Newsweek and Time weekly magazines combined (118,698) (Circulation '08; ABC Magazine Coverage Report, '07-MSA)
- The Dallas Morning News/Fort Worth Star-Telegram reaches 42% of DMA adults on a single Sunday. The entire cable TV universe reaches only 45% of DMA adults (Scarborough 2008, Release 1)
- Compared to the average adult in U.S., daily Dallas Mrng Nws/Fort Worth Str-Tlgrm readers are:

115% stay at any upscale hotel/motel	58% more likely to own a PDA
66% more likely to use any stockbroker	54% more likely to have a college degree+
61% more likely to have HHI \$100,000+	50% more likely to have mgr/busn/fin'l occup.
- Compared to the average adult in U.S., Sunday Dallas Mrng Nws/Fort Worth Str-Tlgrm readers are:

105% more likely to take 3+ any dom air trips-bus	54% more likely to visit Mexico
71% more likely to take 3+ any dom air trips-per/vc	49% more likely to use online service
67% more likely to rent a car for business	46% more likely to take 1+ any frgn trips-busn
- The dallasnews.com, star-telegram.com, and dfw.com are the area's most powerful local sites for effective online advertising