



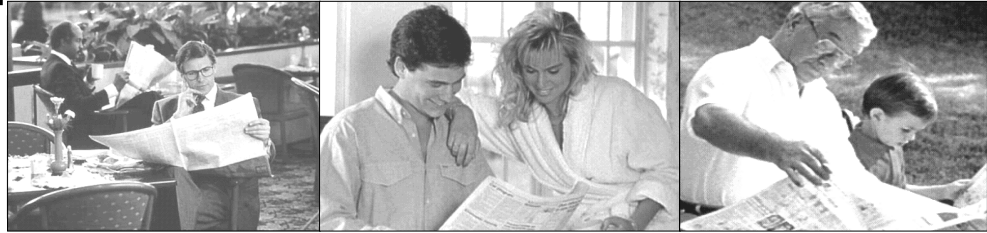
Dallas/Fort Worth DMA

Fort Worth-Arlington PMSA

	<u>#</u>	<u>U.S.Rank</u>	<u>#</u>	<u>U.S.Rank</u>
Households	2,194,300	#7	649,800	#34
Population	6,016,900	#7	1,773,000	#30
EBI	\$130.5 Billion	#8	\$36.9 Billion	#31
Retail Sales	\$87.4 Billion	#7	\$26.6 Billion	#32

Market Highlights

- Fort Worth is the 30th-largest metro area in the U.S. and 3rd-largest in Texas – the Dallas PMSA by itself would rank just 18th in population and 19th in households as a DMA
- Fort Worth's population growth rate between 2001- 2002 was the highest among Texas' 10 largest cities, and of the 25 biggest cities in the United States, Fort Worth grew the fastest, at 5.3% between April 2000 and July 2002 (*Census Bureau*). The city of Fort Worth added 93,000 people since 1990, and the 4-county Fort Worth PMSA area (Tarrant, Johnson, Parker & Hood counties) grew by 375,000. From 2000 to 2010, the entire Fort Worth/Dallas Metroplex is expected to grow by 1 million
- While demographically similar, each part of Fort Worth/Dallas Metroplex maintains its own identity, characteristics, area codes, loyalties and its own newspaper
- Tarrant county has a higher median HH effective buying income (\$46,781) than Dallas county (\$46,703) - and Tarrant's median EBI is more than \$8,000 higher than the state average (\$38,669)
- Dallas/Fort Worth has the #1 "income-growth batting average" in the U.S. among 172 metro markets at .733, growing faster than the national rate during the past 30 years (*American City Business Journals*, 6/03)
- 4 Fortune 500 HQs in the Fort Worth/Arlington area: American Air, Burlington Northern Santa Fe, Radio Shack, and D.R. Horton; other top firms in the area include Pier 1, Lockheed Martin, Bell Helicopter-Textron, SABRE, Delta Airlines, GM, Alcon Labs, FAA SW HQs, & Bank One Fort Worth
- The DFW Int'l Airport, located halfway between Ft. Worth & Dallas, is the 4th-busiest U.S. airport, and 6th in the world, with over 52 million total passengers annually (*ACI*, 8/02); offering service to 160 destinations around the world, it is predicted to be the nation's 2nd-busiest airport by 2012 (*Boyd Group*, 5/03)
- Among top 50 MSA households, Fort Worth is ranked 6th-lowest total cost of living, and ranked 3rd-lowest in housing cost of living (*ACCRA*, 4th Qtr 2002; *Detroit, Seattle, Miami, Ft. Laud, Columbus, & Milwaukee not measured*)
- Fort Worth is ranked:
 - #2 "Best cities for entrepreneurs" in the S.W. region, and #5 in the U.S. (*Entrepreneur/Dun & Bradstreet*, 10/02)
 - #6 "Picture perfect metros," based on global cities with command points, key marketplaces, and major sites of production and innovation (*Plants Sites & Parks*, 3/03)
 - #13 "America's hottest cities" most attractive for expansion/relocation (*Expansion Management Magazine*, 1/03)
 - #16 "Best U.S. places for business and career" (*Forbes*, 5/03)
 - #19 "Best overall metro to locate a company" (out of 329 metros) (*Expansion Management Magazine*, 8/03)
- 7.5 million people visit Fort Worth annually, with a \$900+ million economic impact in direct spending within the city of Fort Worth, & over 1.1 billion in the Fort Worth area (*Fort Worth Convention & Visitors Bureau*)
- New development: \$75-million Fort Worth Convention Center expansion, providing over 250,000 sq. ft. exhibit space, opened 5/03; Fort Worth rail market downtown; major building for the Modern Art Museum of Fort Worth opened in 2002, now the 2nd-largest modern art museum in the country; Texas Civil War Museum scheduled for completion in summer 2004; \$21-million National Cowgirl Museum and Hall of Fame, open 6/02; La Grave Field, home of Fort Worth Cats Baseball stadium



Circulation

	<u>Daily</u>	<u>Sunday</u>
Total*	231,881	329,739
DMA	222,796	327,714
PMSA	203,556	299,718

Readership

	<u>Daily</u>	<u>Sunday</u>
DMA	590,420	847,090
PMSA	528,005	729,450
College Grad+	131,340	178,375
Professional/Managerial	180,305	217,305
Average HH Income	\$75,867	\$72,644
PMSA Reader Income	\$15.4 Billion	\$21.8 Billion

Newspaper Highlights

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

	<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>
HHI \$50,000+	129	128	86	Own stock/stock options	131	99	75
College Grad+	117	114	72	Professional/Manager	122	96	62
Own Mutual Funds	123	104	80	Any internet purchase	121	115	81
- The Fort Worth Star-Telegram is the 3rd-largest daily newspaper in Texas
- Only 6% of the daily Dallas Morning News circulation goes into the Fort Worth PMSA
- Daily, the Dallas Morning News misses 80% of DMA HHs and 94% of Fort Worth PMSA HHs; on Sunday, the Dallas Morning News misses 68% of DMA HHs and 90% of Fort Worth PMSA HHs
- Daily, Star-Telegram readers have an HHI 14% higher than the PMSA average HHI – a difference of over \$9,400; on Sunday, Star-Telegram readers have an HHI 9% higher (over \$6,200 more) than the average for PMSA adults
- The Fort Worth Star-Telegram provides far greater coverage of PMSA adults than A.M. drive-time radio, or even 1 prime time TV spot each from ABC, CBS, FOX & NBC combined (*Scarborough 2003, Rel 1*)

	<i>% PMSA Adults</i>		<i>% PMSA Adults</i>
Daily Star-Telegram	41%	A.M. Drive Time Radio (average ¼ hour, 50 stations)	21%
Sunday Star-Telegram	57%	Prime Time TV: ABC, CBS, FOX, NBC	15%
- On an average weekday, the Fort Worth Star-Telegram reaches over 203,556 PMSA households – nearly 5 times more households reached by Newsweek, Time, & U.S. News weekly magazines combined (41,724) (*Circulation 2003; ABC Magazine Market Coverage Report, 2002- MSA*)
- Over 4 out of 5 adults (82%) who read a daily newspaper in the Fort Worth PMSA turn to the Star-Telegram, and 9 out of 10 adults (90%) on Sunday
- Compared to the average adult in the U.S., daily Fort Worth Star-Telegram PMSA readers are:

86% more likely to rent a car for business	42% more likely to have a 401K Plan
66% more likely to have broadband connection	30% more likely to play golf
44% more likely to use American Express card	28% more likely to have second home/property
- Compared to the average adult in the U.S., Sunday Fort Worth Star-Telegram PMSA readers are:

77% more likely to take 3+ dom. prs/vac air trips	38% more likely to stay at hotel/motel-business
55% more likely to use an on-line service	32% more likely to travel abroad-business only
45% more likely to take 1+ cruise past 3 years	23% more likely to own a cellular phone