



Fresno Highlights

- Centrally located in the heart of the San Joaquin Valley, the Fresno DMA encompasses 11% of the state of California; sixth-largest county in land area in the state, including 6,000 square miles
- Fresno County's population has nearly doubled since 1980, and is expected to be over 1 million by 2020; of the top 50 U.S. cities in population, Fresno was ranked #12 in % change (an 8% increase) during the period of 2000-2005, (U.S. Census Bureau)
- Over the past 10 years, Fresno's civilian employment has grown 45,400 (+14.3% change); during the same period of time, nonfarm employment grew 42,300 (+17.4%) (Labor Mkt Info Division, updated 4/05)
- Fresno is ranked as the #2 metro (of 275) in house price appreciation from the period of 1st qtr. 2002 to 2006, with a 145.3% increase (Office of Federal Housing Enterprise Oversight (OFHEO), 2006)
- Of the top 60 HH DMAs, Fresno ranks in sales per HH as: #4 department store sales, #16 in food & beverage store sales, #16 in TV/ VCR/tape sales, #20 in HH appliances, #20 in gasoline service station sales, #21 in building materials, & #21 in drugs/HBA stores; and in a 5-year % change as: #12 in total population, #14 in total retail sales, #17 in HHs, and #18 in EBI (Demographics USA, 2006)
- Major private employers in Fresno County include Community Medical Centers, Foster Farms, Saint Agnes Medical Center Kaiser Medical Center, Pelco, Gottschalks, Zacky Farms, Harris Ranch Beef, The Gap, Sun-Maid, Sunrise Medical, Guardian Industries, Grundfos Pumps, Wawona Frozen Foods, Play It Safe Int'l., and Stamoules Produce (The Business Journal, 2006 Book of Lists)
- Fresno, the only city surrounded by three national parks, provides easy access to Yosemite, Sequoia, and Kings Canyon; a wide variety of cultural and sports activities: Fresno Art Museum; Fresno Philharmonic Orchestra; Fresno International Grand Opera; Fresno Convention Center, which includes Selland Arena, used for concerts, sporting events, and exhibits; Fresno Metropolitan Museum, featuring the William Saroyan Theater, seating over 2,300, and the Reeves Science Center; sports activities include the Fresno Grizzlies' AAA minor league baseball, the Fresno Falcons, west coast hockey league, & the Fresno Frenzy indoor football team (Fresno Cnty Economic Devt Corp.)
- Fresno is ranked as:
 - #4 "Best city for doing business" overall for medium sized metros (150,000-450,000 jobs), and is ranked #11 (of 277) of all metros in fastest, most sustained growth (Inc., 5/04)
 - #7 "Best performing city" (of the 200 largest metros) in 1-year relative high-tech GDP growth; also ranked #23 in 5-year wages & salaries growth, and #35 in 5-year job growth (Milken Institute, 2005)
 - #12 "Best metro with highest 5-year cumulative growth rate" (Freddie Mac's Conventional Mortgage Home Price Index of 163 MSAs, 2004 4th Qtr)
 - #19 "Highest 5-year business growth" (of top 100 metros) from 2000 to 2005 (InfoUSA's Sales Genie, 3/05)
- Located 182 miles southeast of San Francisco and 215 miles northeast of Los Angeles, Fresno is a perfect test market for national advertisers due to limited media spill-ins
- The Fresno Yosemite International Airport serves the San Joaquin Valley with 2005 passenger volume of 1.9 million, a 7% increase over 2004 (FlyFresno, 1/06)

New California Market Highlights

- The "New California" market is composed of two top DMAs: Fresno and Sacramento/Modesto, with more households than all but 11 U.S. DMAs



	<u>Circulation</u>			<u>DMA Readership</u>	
	<u>Daily</u>	<u>Sunday</u>		<u>Daily</u>	<u>Sunday</u>
Total	160,765	186,548	DMA	424,614	498,665
DMA	159,629	185,206	College Grad+	83,065	96,278
Metro	123,054	140,092	Professional/Mgr'l	89,794	108,825
			Average HH Income	\$74,824	\$73,948
			DMA Reader Income	\$31.8 Billion	\$36.9 Billion

Newspaper Highlights

- Newspaper is the medium that reaches the most upscale, high-end consumers in the Fresno market. Heavy newspaper readers index far above heavy users of both TV and radio among the most valuable prospects in the Fresno 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>
HHI \$100,000+	174	91	68	Own money market funds	155	96	64
Use travel agent	164	114	81	Own stocks/stock options	153	102	96
Own mutual funds	163	97	101	Post graduate degree+	152	113	53

- The Fresno Bee is Central California's leading paper; 10th-largest daily and 10th Sunday in the state
- Daily, Fresno Bee readers have an HHI 18% higher than the DMA average –over \$16,400; on Sunday, readers have a HHI 15% higher (over \$15,500 more) than the average for DMA adults
- On any average weekday, the Fresno Bee reaches over 123,000 metro households – nearly 7 times more households reached by Newsweek, Time, & U.S. News weekly magazines combined (17,701)
(Circulation 2007; ABC Magazine Market Coverage Report, 2006- MSA)

- The Fresno Bee provides far greater coverage of metro adults than A.M. drive-time radio, or even 1 prime time TV spot each from ABC, CBS, FOX & NBC combined *(Scarborough 2006, Release 2)*
- | | <i>% Metro Adults</i> | | <i>% Metro Adults</i> |
|-------------------|-----------------------|--|-----------------------|
| Daily Fresno Bee | 44% | A.M. Drive Time Radio <i>(average ¼ hour, 56 stations)</i> | 21% |
| Sunday Fresno Bee | 54% | Prime Time TV: ABC, CBS, FOX, NBC | 14% |

- The Fresno Bee has the highest % metro penetration in circulation within the state (daily 44.6%, and Sunday 50.7%); the Bee is also ranked #3 daily and #11 on Sunday in % penetration of the top newspaper within the top 75 metro HHs *(Circulation 2007)*
- Virtually all adults in the Fresno metro area who read a newspaper turn to the Bee (96.6%) daily, and (98.3%) on Sunday
- Compared to the average adult in the U.S., daily Fresno Bee readers are:
101% more likely to have mrkt value hm \$250M+ 33% more likely to own digital video rcdr (TiVo)
56% more likely to own/lease frgn luxury vehicle 30% more likely to own 2+ new vehicles
34% more likely to own second home/property 21% more likely to play golf
- Compared to the average adult in the U.S., Sunday Fresno Bee readers are:
66% more likely to visit Mexico 25% more likely to take 3+ any dom pers/vac trip
38% more likely to have online service 25% more likely to rent a car for business
34% more likely to take a cruise 17% more likely to take any dom business trips
- FresnoBee.com, website for the Fresno Bee, is the area's most powerful local medium for effective online advertising, with over 503,000 unique visitors monthly *(Fresno Bee)*

New California Newspaper Buy

- The "New California" Buy: Fresno/Sacramento/Modesto Bees offer the 2nd-largest newspaper circulation in California, behind only the L.A. Times

Circulation 2007; Scarborough Report 2006, Rel. 2; ABC Magazine Market Coverage Report, 2006-MSA