

The Oklahoma City Market

Newspapers First
THE LEADER IN MAJOR MARKETS



	<u>DMA</u>		<u>CBSA</u>	
	#	<u>U.S. Rank</u>	#	<u>U.S. Rank</u>
Households	673,700	#46	470,200	#43
Population	1,699,000	#47	1,175,400	#45
EBI	\$29.6 Billion	#51	\$21.8 Billion	#48
Retail Sales	\$25.2 Billion	#50	\$18.4 Billion	#45

Market Highlights

- Oklahoma City is the state capital; the largest city in the state of Oklahoma, and the nation's 2nd-largest city in land area; a growing regional distribution center with a central U.S. location, with major interstate highways, rail lines, and a major international airport
- Oklahoma City's population grew over 10% from 1980-1990 and 13% from 1990-2000, and is projected to grow 21% from 2000 through 2030, to 1,329,000 (*Okl. Dept of Commerce*); nonfarm employment grew 3.3% from 9/06-9/07, outperforming the state (+1.4%) and the U.S. (+1.2%) (*U.S. Dept. of Labor/BLS*)
- Oklahoma City has the lowest housing payment as a percent of HH income (*bizjournal*, 3/07), & is one of the nation's most affordable metros overall, as well as in groceries and & utilities; cost of living is lower than Montgomery, Charleston, Albuquerque, Jacksonville, Raleigh, Wilmington, Buffalo, Orlando, Norfolk, Richmond, Portland, & 10% lower than the nation's (*ACCRA Cost of Living Index, 4th Qtr, 2007*)
- Three Fortune 1000 firms are in the area: Devon Energy, Chesapeake Energy, and OGE Energy (*Fortune*, 4/07); other top employers include: Tinker Air Force Base, with a \$1.6 billion economic impact to the MSA, UPS, INTEGRIS Health, FAA Aeronautical Center, OU Health Sciences Center, AT&T, Dobson Communications, Hobby Lobby, SSM Health Care, Dell, Univ. of Oklahoma, Dayton Tire, W.H. Braum's, Cytorange Biologics, Dell, Hoffman, American Fidelity, and Midfirst
- One of the nation's major centers of health delivery, with over 65,000 employed in the healthcare sector in the area; the Oklahoma Health Center is a 300-acre complex 5 miles from downtown, housing 26 health-related institutions, and generating \$1.7 billion in annual economic impact
- Over the past 10 years, \$370 million was spent in Oklahoma City's MAPS (Metro Area Projects) revitalization, including: 15,000-seat Southwestern Bell Bricktown Ballpark; new 20,000-seat Ford Center arena; new trolley system; other development: for Civic Center Music Hall; Oklahoma City Art Museum; Bricktown Canal Entertainment District; First Nat'l Center, Project HM; Paycom; SMICO
- Just a 4-hour flight to major cities on both coasts, Will Rogers World Airport handles 87 departures daily, and served over 3.7 million passengers in 2007; a \$110-million expansion was completed in 2006; 3 other airports serve the area: Wiley Post, Clarence Page, & Sundance Airports (*flyokc.com*, 1/08)
- Oklahoma City is ranked as:
 - #1 "Most affordable housing" with population over 1 million (*HUD: Kiplinger.com; Expansion Mgmt*, 2007)
 - #2 "Least expensive place to rent in America" (*MSNBC*, 2/08)
 - #2 "Best US housing market "with highest % increase change, 1st qtr '07 vs 1st qtr, '06 (*NAR: Forbes*, 5/07)
 - #5 "Top metro in 10-year income growth rate" (*bizjournal.com*, 6/07, of top 100 metros)
 - #4 "Least stressful city" for unemployment, commute, air quality, crime, sunshine (*bizjournal.com*, 2/08)
 - #5 "Top 40 real estate market for 2006" (*Expansion Management*, 2006)
 - #5 "Best medium market for relocating families" in home prices, appreciation, taxes (*Worldwide ERC*, '07)
 - #6 "Best performing market for retail vacancy, rental rates, development, & pricing (*Co-Star Advisor*, 8/07)
 - #7 "Cleanest city" based on air and water quality (*Forbes*, 3/08)
 - #8 "Best overall quality of life" (*2007 Quality of Life Quotient, Expansion Mgmt*, metros over 1 million)
 - #10 "Best city for jobs" for unemployment, job/income growth, median HH, cost of living (*Forbes*, 10/07)

Source: Demographics USA, 2007

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Oklahoman Delivers The
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	<u>Circulation</u>			<u>DMA Readership</u>	
	<u>Daily</u>	<u>Sunday</u>		<u>Daily</u>	<u>Sunday</u>
Total	208,526	285,014	DMA	393,945	579,248
DMA	180,732	253,350	College Grad+	114,799	152,909
Metro	150,585	214,855	Professional/Mgr'l	105,291	166,024
			Average HH Income	\$67,287	\$65,633
			DMA Reader Income	\$26.5 Billion	\$38.0 Billion

Newspaper Highlights

- Newspaper is the medium that reaches the most upscale, high-end consumers in the Oklahoma City market. Heavy newspaper readers index far above heavy users of both TV and radio among the most valuable prospects in the Oklahoma City 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>
Mkt val hm \$300M+	190	106	70	Post grad degree+	144	100	92
Cordials/liqueurs	164	117	99	Money market account	142	73	96
HHI \$100,000+	158	111	69	3+ dom air trip-pers/vac	139	104	83

- The Daily and Sunday Oklahoman is the largest newspaper in the Oklahoma City metro and DMA, as well as in the entire state of Oklahoma
- In the DMA, the Oklahoman accounts for 61% and 71% of total daily and Sunday newspaper circulation
- Daily Oklahoma City Oklahoman readers have a HHI 11% higher than the DMA average HHI – a difference of over \$6,800; on Sunday, Oklahoman readers have a HHI 9% higher (over \$5,100 more) than the average for DMA adults
- The leading newspaper in larger markets than Oklahoma City (#46 HH DMA) offers far less coverage:

	<i>Daily</i>	<i>Sunday</i>		<i>Daily</i>	<i>Sunday</i>
Oklahoma City Oklahoman	27%	38%	Minneapolis Star Tribune	20%	34%
Cleveland Plain Dealer	21%	28%	Chicago Tribune	15%	25%
Memphis Commercial Appeal	21%	27%	Orlando Sentinel	15%	22%

- The Oklahoma City Oklahoman provides far greater coverage of CBSA adults than A.M. drive-time radio, or even 1 prime time TV spot each from ABC, CBS, FOX & NBC combined
- | | <i>% DMA Adults</i> | | <i>% DMA Adults</i> |
|------------------|---------------------|---|---------------------|
| Daily Oklahoman | 34% | A.M. Drive Time Radio (average ¼ hour, 35 stations) | 18% |
| Sunday Oklahoman | 52% | Prime Time TV: ABC, CBS, FOX, NBC | 18% |
- On an average weekday, the Oklahoma City Oklahoman reaches over 180,000 DMA households – over 6 times more households reached by Newsweek and Time weekly magazines combined (28,646)
(Circulation 2008; ABC Magazine Market Coverage Report, 2007- DMA)

- Over 4 out of 5 adults (85.2%) who read a daily newspaper in the Oklahoma City MSA turn to the Oklahoman, and over 9 out of 10 (95.3%) read the Oklahoman on Sunday
- Compared to the average adult in the U.S., daily Oklahoma City Oklahoman DMA readers are:
43% more likely to use full-service stockbroker 21% more likely to have a college degree+
23% more likely to own a single-family home 17% more likely to own 2+ new vehicles
23% more likely to have CDs (certificate of dep.) 14% more likely to own a high-definition T.V.
- Compared to the average adult in the U.S., Sunday Oklahoma City Oklahoman DMA readers are:
106% more likely to own/lease dom luxury vehicle 17% more likely to stay hotel/motel for business
35% more likely to have computer on-line service 16% more likely to have attended any college+
26% more likely to work in mgmt, busn & finance 11% more likely to own digital video recorder
- newsOK.com website for the Oklahoma City Oklahoman is the area's most powerful local medium for effective online advertising, with over 400,000 unique visitors monthly *(Nielsen/NetRatings, 8/07)*

Source: Circulation 2008; Scarborough 2007, Rel. 2;