



	<u>DMA</u>		<u>CBSA</u>	
	#	<u>U.S. Rank</u>	#	<u>U.S. Rank</u>
Households	388,300	#81	404,000	#49
Population	998,800	#80	1,043,100	#49
EBI	\$18.6 Billion	#75	\$19.3 Billion	#52
Retail Sales	\$13.5 Billion	#82	\$13.8 Billion	#54

### Market Highlights

- 49<sup>th</sup>-largest metro area in the US, Rochester is the 3<sup>rd</sup>-largest metropolitan area in NY state, located along Lake Ontario's south shore, providing an economic bridge to Washington, NYC, Toronto, Philadelphia, Detroit, Cleveland, Boston, Baltimore and Montreal; nation's top per-capita exporter.
- The Rochester metro has more households than the DMA – a marketing rarity
- Rochester has a lower cost of living than Milwaukee, Orlando, Buffalo, Grand Rapids, Richmond, Chicago, New Haven, Portland, Hartford, Baltimore, Ft. Lauderdale, Providence, Boston, (ACCRA, 1st qtr '06)
- A world leader in photographic and communications equipment, optics and laser graphics; home to Kodak, Xerox and Bausch & Lomb; more than 70 biotech companies, including Ortho-Clinical Diagnostics, Cooper-Vision, Thermo Fisher Scientific, UCB Pharma, ACM Medial Labs, Getinge USA, & Genencor Int'l; top employers in other industries: Univ. of Rochester/Strong Health, Wegmans Food Markets, Xerox Corp., ViaHealth, Unity Health System, Lifetime Healthcare, ITT, Tops Markets LLC, Paychex Inc., Harris Corp., Hillside Agencies, Frontier Co, & Delphi Corp. (Grtr Rochester Enterprise, 2006)
- One of the most affordable metros, with an average single-family home cost of \$117,200, ranked #18 out of 150 metros; lower than Syracuse, Cleveland, Grand Rapids, Omaha, Memphis, Glens Falls, Albany, Milwaukee, Hartford, Providence, New Haven, and Bridgeport (Natl Assoc. of Realtors, 8/07)
- Compared to the top 75 HH DMA's, Rochester is ranked by index as: (Scarborough USA+ 2006, Release 2)
 

#2 use financial planner	#7 own money market funds	#9 take 1+ foreign pers/vac trip
#3 has home improvement loan	#7 any upscale restaurant	#9 own IRA's
#6 own bonds	#7 own mutual funds	#10 play golf
- The Rochester DMA is the most affluent market in upstate New York:
 

<u>DMA</u>	<u>Average HHI EBI</u>	<u>Rochester's % Advantage</u>	<u>Median HHI EBI</u>	<u>Rochester's % Advantage</u>
Rochester	\$48,025	---	\$39,257	---
Albany	46,934	+ 2.3%	38,146	+ 2.9%
Syracuse	43,517	+ 10.4%	35,582	+ 10.3%
Buffalo	42,520	+ 13.0%	34,966	+ 12.3%
- New downtown development includes: Chase Tower renovation; Renaissance Square, a multi-purpose transit station, performing arts center, and educational facility; Alexander Park (Genesee Hospital); downtown Eastman Theatre renovation; Frontier Building; Troup Howell Bridge; The Mills at High Falls housing; company development includes: ACM Medical Labs expansion; Animatics Corp opens east coast operation; Pactiv expansion; Merrill Lynch opens new facility; GM's Hone-oye Falls launch for Chevy Equinox Fuel Cell vehicle; Bausch & Lomb opening of new R&D facility
- Rochester is ranked as:
  - #1 "Best metro for overall quality of life among metros with population over 1 million" (Expansion Mgmt, 6/07)
  - #2 "Most affordable metro in home price" (of the top 50 HH metros) (National Association of Realtors, 8/07)
  - #4 "Top metro with affordable housing" for population over 1 million (Expansion Mgmt, HUD, Kiplinger.com, '07)
  - #5 "Hot city for entrepreneurs" in the Northeast (Entrepreneur Magazine, 2006)
  - #5 "Top metro for real estate gains" (4/07-4/08 forecast, of top 100 markets) (Fiserv Lending Solutions, 4/07)
  - #6 "Most livable city," based on housing, local economy, transportation, education, health care, low crime, ambience, recreation, climate and transportation (Places Rated Almanac, 2007)
  - #6 "Top metro with best public schools" of population 1 million (Expansion Mgmt, 2006 Education Quotient)

Source: Demographics USA, 2006; Scarborough 2006, Rel. 2



	<u>Circulation</u>			<u>DMA Readership</u>	
	<u>Daily</u>	<u>Sunday</u>		<u>Daily</u>	<u>Sunday</u>
Total	166,170	223,553	DMA	403,390	524,277
DMA	157,459	208,791	College Grad+	118,436	154,663
Metro	158,203	210,532	Professional/Mgr'l	101,899	138,013
			Average HH Income	\$70,199	\$69,328
			DMA Reader Income	\$28.3 Billion	\$36.3 Billion

**Newspaper Highlights**

- Newspaper is the medium that reaches the most upscale, high-end consumers in the Rochester market. Heavy newspaper readers index far above heavy users of both TV and radio among the most valuable prospects in the Rochester 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 value hm \$300M+	183	74	56	Took cruise past 3 yrs	136	116	88
Full service stockbroker	161	63	81	HHI \$100,000+	135	87	31
3+ dom prs/vac air trip	147	105	65	Visited Europe past 3 yrs	134	68	57

- 2<sup>nd</sup>-largest newspaper in upstate N.Y., ahead of Syracuse Herald-American and Albany Times Union
- The Rochester Democrat & Chronicle reaches 40% of the DMA households daily, and 53% on Sunday
- The Rochester newspapers have the highest daily & Sunday DMA coverage among U.S. newspapers for the top 100 DMA HHs, as well as the highest HH coverage for papers with 100,000+ circulation
- The Rochester Democrat & Chronicle provides high reach of Rochester's DMA adult readers at 52% daily and 68% on Sunday
- Daily Democrat & Chronicle readers have a household income 6% higher (\$4,121) than the average for adults in the DMA, and Sunday readers have a household income 5% higher (\$3,249) than the average for adults in the DMA
- On an average weekday, the Rochester Democrat & Chronicle reaches over 158,000 metro households – over 3½ times more households reached by Newsweek, Time, & U.S. News weekly magazines **combined** (42,247) (Circulation 2007; ABC Magazine Market Coverage Report, 2006- MSA)
- The Rochester Democrat & Chronicle provides far greater coverage of DMA adults than drive-time radio, or one prime time TV spot each from ABC, CBS, FOX, and NBC **combined**: (Scarborough 2007, Rel. 1)

	<i>% DMA Adults</i>		<i>% DMA Adults</i>
Daily Democrat & Chronicle	52%	A.M. Drive Time Radio (average ¼ hour, 47 stations)	20%
Sunday Democrat & Chronicle	68%	Prime Time TV: ABC, CBS, FOX, NBC	19%
- Nearly 9 out of 10 adults (88%) who read a daily newspaper in the Rochester MSA turn to the Democrat & Chronicle, and over 9 out of 10 adults (92%) on Sunday
- Compared to the average adult in the U.S., daily Rochester Democrat & Chronicle readers are:

108% more likely to use a financial planner	43% more likely to have HHI home equity loan
79% more likely to drink cordials/liqueurs	42% more likely to have mutual funds
47% more likely to own bonds	32% more likely to own CDs
- Compared to the average adult in the U.S., Sunday Rochester Democrat & Chronicle readers are:

69% more likely to take 3+ foreign pers/vac trips	26% more likely eat at upscale restaurant
60% more likely have online service	25% more likely to own 2+ cars
50% more likely to play golf	23% more likely to be a college grad+
- Democratandchronicle.com, website for the Rochester Democrat and Chronicle, is the area's most powerful local medium for effective online advertising, with over 700,000 unique visitors monthly (Nielsen/Net Ratings, 8/06)