

The San Francisco Bay Area Market

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	<u>San Francisco/Oakland/San Jose DMA</u>		<u>*5-County "Bay Area Buy Market"</u>	
	#	<u>U.S. Rank</u>	#	<u>U.S. Rank</u>
Households	2,457,000	#5	1,692,630	#15
Population	6,801,700	#5	4,854,801	#12
EBI	\$182.7 Billion	#4	\$126.9 Billion	#9
Retail Sales	\$103.0 Billion	#6	\$71.6 Billion	#16

* Ranking on r totals for Santa Clara, Contra Costa, Alameda, Marin, and Solano counties, compared to DMA counts

San Francisco Bay Area Highlights

- The San Francisco/Oakland/San Jose Bay Area is the 2nd-most populous region in California, and the 5th-largest DMA in HH & population; by 2035, population is expected to be over 9 million, nearly a 2 million increase (27%), and the number of jobs is expected to be over 5.2 million, a 1.8 million increase (52%) (9-county area; ABAG, 2007 projections, period from 2005-2030)
- The San Francisco/Oakland/San Jose area is the wealthiest DMA based on average EBI (\$74,361), median HH EBI (\$55,783), and per capita EBI (\$26,861) (Demographics USA, 2006)
- Home to Silicon Valley, ranked #1 in the U.S. for: information technology, with more high-tech firms - 1,500 of the 2,500 largest electronics firms are based here; more knowledge-based economies, as well as in the world; highest economic productivity, twice of the U.S. average; largest concentration for basic & applied research facilities; more foreign-owned R&D facilities; highest number of venture capital per capita - over a quarter of all U.S. venture capita, with \$5.2 billion from January-September 2006; and is ranked #2 for: more Fortune 500 firms; and in highest value of its exports, with overseas sales exceeding only Texas (Bay Area Economy Forum; Bay Area Gov't/Councils; 2007 Silicon Valley Index/Joint Venture)
- The Bay Area is ranked #1 statewide with over 370,000 high-tech workers (215,000 in San Jose/Silicon Valley alone), and #1 with the highest high-tech payroll (AeA/California Cybercities, 2006)
- 26 Fortune 500 companies in the Bay Area, including: Chevron, Hewlett-Packard, McKesson, Wells Fargo, Safeway, Intel, Cisco, Apple, Oracle, Gap, Sun Microsystems, PG&E, Solectron, Sanmina-SCI, Seagate, Google, Applied Materials, Calpine, Yahoo, eBay, Agilent Technologies, Charles Schwab, Advanced Micro Devices, Ross Stores, Clorox, and URS (Fortune 4/07)
- The DMA ranks #1 in: own home value \$300,000; own 2+ new cars; own/lease foreign luxury vehicle; any college+; have money market account; stayed at upscale hotel for business or pers/ vacation; own PDA; have online service; and is ranked #2 in: HHI \$100,000+; post graduate degree; prof/managerial occupation; 401K plan; own money market fund; own second home/ property; stocks/stock options; use travel agent; 1+ any domestic air trip for business or pers/vacation; rent car for pers/vacation; bought hardware/software; shop or purchase online (Scarborough 2006, Rel. 2)
- The San Francisco Int'l Airport is the 14th busiest U.S. airport with 33.5 million passengers in 2006 (ACI); is ranked #1 "Best domestic airport" (Executive Travel Magazine, 2005); #2 "Best airport in N. America (Skytrax World Airport Award, 2006); and #4 Best U.S. airport for business travelers" (Business 2.0, 8/06); other airports serve the area: Norman -Y. Mineta San Jose Int'l Airport, 10 minutes downtown, expected to accommodate 18 million passengers by 2010; Oakland Int'l Airport; as well as 12 regional airports
- Researchers at Stanford (University of California at Berkeley), have won 54 Nobel Prizes
- The Bay Area market is ranked as:
 - #1 "Best market (San Jose) to grow a small business (of 75); & SF/Oakland is ranked #3 (bizjournals, 7/07)
 - #1 "Top area w/most patent/grants"(SF 2X, SJ/Santa Clara 10X nationally per employee (U.S. Patent Off)
 - #1 "Best market in number of top 10 university grad programs in law, medicine, and engineering"
 - #1 "Top market for the highest % of fastest-growing small businesses in US" (Bay Area Marketing Partnership)
 - #2 "Top 10 tech town" (Wired Magazine, 1/07)
 - #3 "Top large metro in number of adults creating new businesses each month" (Kauffman Foundation, 5/07)
 - #24 "Top economic market in the world;" #1 on per capita basis, ranking ahead of all nat'l economies

Source: Demographics USA, 2006; Scarborough Report, 2007, Rel 1;
*5-county Bay Area Buy: Alameda, Contra Costa, Marin, Santa Clara, and Solano counties

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	<u>Circulation</u>			<u>DMA Readership</u>	
	<u>Daily</u>	<u>Sunday</u>		<u>Daily</u>	<u>Sunday</u>
Total	769,863	799,008	DMA	1,492,870	1,533,837
5-County* BAB Market	634,108	672,771	College Grad+	562,639	579,889
			Prof/Managerial	486,122	480,312
			HHI \$75,000+	871,288	872,446

SF Bay Area Buy Newspaper Highlights

- Newspaper is the medium that reaches the most upscale, high-end consumers in the San Francisco/Oakland/San Jose DMA Market. Heavy newspaper readers index far above heavy users of both TV and radio among the most valuable prospects in the San Francisco/Oakland/San Jose DMA Market:

	<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>
Use stockbroker	152	97	116	Own money mkt fund	136	90	101
Post-graduate degree+	142	70	59	Own IRA	135	89	88
Upscale hotel-business	141	107	45	HHI \$100M+	130	96	59

- Daily, the SF Bay Area Buy readers have a 9% higher HHI than the average SF/Oakland/San Jose DMA adult – a difference of over \$10,100; on Sunday, SF Bay Area Buy readers have a HHI 5% higher (\$6,200 more) than the average SF/Oakland/San Jose DMA adult

- The SF Bay Area Buy combination has the 2nd-daily newspaper circulation and Sunday newspaper in California, and the largest DMA circulation daily and Sunday in the San Francisco Bay Area Buy Area (*Fas-Fax, 3/07*)

- The SF Bay Area Buy offers 293,683 more daily circulation (70%) than the San Francisco Chronicle, and 216,835 more on Sunday (49%) (*Fas-Fax, 3/07*)

- In the DMA, the SF Bay Area Buy has more upscale daily readers than those of the San Francisco Chronicle, with an advantage of:

	<i>SF Bay Area Buy</i>	<i>SF Chronicle</i>	<i>SF Bay Area Buy Advantage</i>		<i>SF Bay Area Buy</i>	<i>SF Chronicle</i>	<i>SF Bay Area Buy Advantage</i>
HHI \$75M+	851,288	586,348	264,940	Stocks/options	685,572	478,332	207,240
Coll educ+	1,054,060	726,016	328,044	Dom prs/vc air trps	833,534	567,006	266,528
Prof/Mgr	486,122	355,287	130,287	Own cell phone	1,139,280	703,961	435,319

- In the DMA, the SF Bay Area Buy has more upscale Sunday readers than those of the San Francisco Chronicle, with an advantage of:

	<i>SF Bay Area Buy</i>	<i>SF Chronicle</i>	<i>SF Bay Area Buy Advantage</i>		<i>SF Bay Area Buy</i>	<i>SF Chronicle</i>	<i>SF Bay Area Buy Advantage</i>
Hm vl \$250M+	1,059,052	714,810	344,242	any dom bus trps	441,235	327,927	113,308
Own home	1,136,497	740,843	395,654	Any car rental	718,705	512,313	206,392
1+ foreign trips	861,125	662,676	198,449	Online service	1,213,296	842,111	371,185

- The daily SF Bay Area Buy reaches more readers who are more high-end consumers than the San Francisco Chronicle:

121% more luxury vehicle owners	63% more home owners with mkt value of \$300M+
87% more pool/spa owners	62% more digital video recorder owners
76% more drinkers of cordials/liqueurs	60% more travelers stayed at hotel/motel for pers/vac

- The Sunday SF Bay Area Buy reaches more readers who are more high-end consumers than the San Francisco Chronicle:

101% more power boat owners	65% more travelers who took 3+ foreign trips-busn
88% more golfers	56% more cruise takers over the past 3 years
76% more 2+ new vehicles owners	53% more travelers who rent a car for business

- The SF Bay Area Buy provides online reach to over 4.5 million unique visitors monthly

Source: Fas-Fax, 3/07; *5-county Bay Area Buy: Santa Clara, Contra Costa, Alameda, Marin, and Solano counties
Circulation 2007; Demographics USA, 2006; Scarborough Report, 2007, Release 1