



<u>San Francisco/Oakland/San Jose DMA</u>	<u>Bay Area Buy*</u>	<u>% of DMA</u>	
Total Population	5,194,909	2,505,601	48%
College Grad+	1,884,485	933,969	50%
HHI \$100,000+	1,599,029	847,863	53%
Mgr/Busn/Finc'l Operations	711,243	353,976	50%

### Market Highlights

- The San Francisco/Oakland/San Jose Bay Area is the 5th-largest DMA in HH and population; projections include a population change to over 8.7 million, a 29% increase, and a change in total jobs to over 5.1 million, a 36% increase from the period of 2000 through 2030 (*U.S. Census; ABAG*)
- The San Francisco/Oakland/San Jose area is the wealthiest DMA based on average EBI (\$72,106), median HH EBI (\$54,351), and per capita EBI (\$26,220); San Jose is the 2<sup>nd</sup>-wealthiest metro in the U.S. based on median (\$62,138), and 2<sup>nd</sup>-wealthiest average HH EBI (\$81,684) (*Demographics USA, 2004*)
- Of the 11 counties in the San Francisco/Oakland/San Jose Bay Area DMA, Santa Clara (San Jose) is the largest county in population, and Contra Costa #3; San Jose is now the nation's 10<sup>th</sup>-largest city, replacing Detroit (*U.S. Census, 6/05*)
- The Bay Area ranks 2<sup>nd</sup> among total life science clusters (of 11) current impact, based on employment, output, workforce, and investment, including biotechnology, pharmaceuticals, medical devices and research & development; the Bay Area leads life science R&D employment size, average life science VC investment, tech fast 500 companies, and risk capital (*Milken Institute, 6/05*)
- The DMA ranks #1 of the top 75 DMAs in: own home value \$250,000; own stock or stock options; own money market account; have on-line service; have broadband; own IRA; own or lease any foreign luxury vehicle; take 3+ any foreign trips for business; & #2 in: shop or purchase on line; post graduate/study/degree; HHI \$100,000+; & professional/mgr position (*Scarborough 2005, Release 1*)
- The San Francisco Int'l Airport is the 12<sup>th</sup> busiest U.S. airport with 32 million passengers in 2004, a 10% increase over 2003 (*ACI*); named the "Best U.S. airport for business travelers" (*Newsweek Budget Travel, 5/04*), and #2 "Best airport in N. America" (*Skytrax World Airport Award, 2005*); Norman Y. Mineta San Jose Int'l Airport, located 10 minutes from downtown San Jose, also serves the area with 11 million passengers in 2004; by 2010 it is expected to accommodate 18 million passengers
- The Bay Area Buy Market is comprised of Silicon Valley, Santa Clara County and adjacent communities, plus Contra Costa County and southern Alameda County
- Silicon Valley is the epicenter for information technology - more high-tech companies here than any other U.S. region; 1,500 of the 2,500 largest electronics firms are based here; the San Jose metro area has over 12,000 high-tech firms, employing over 463,00 workers (*S.J. Office of Economic Development*)
- San Jose doubles the nation's employee productivity average, and 40% of the workforce has a bachelor's degree or higher, compared to 25% nationally (*Joint Venture, 2003*)
- Contra Costa and southern Alameda counties represent the fastest-growing portion of the DMA; growth in San Francisco county is stagnant
- Fortune 500 firms located in the San Jose/Contra Costa area include Chevron Texaco, Hewlett-Packard, Intel, Cisco Systems, Solectron, Sanmina-SCI, Sun Micro-systems, Calpine, Apple Computers, Calpine, Applied Materials, Agilent, CNF, Advanced Micro Devices, Longs Drug Stores, and Maxtor (*Fortune Magazine, 4/05*); other high-tech firms here are: IBM, eBay, Flextronics, Seagate, Cadence Design, Adobe, Novellus, KLA-Tencor, Yahoo, and Lockheed
- The Bay Area Buy market is ranked #1 in: "Top U.S. area with most patent grants (8,340) (*U.S. Patent Office, 2003*); "Most livable city" (*Partners for Livable Communities, 2004*); "Top metro for venture capitalists' investment"; "Healthiest city" (*Centrum/Sperling, 2005*); "Top high-tech city" based on jobs" (*Popular Science 3/05*); #3 "Best high-tech metropolis" on # and share of scientific/technical workers (*Regional Review Q4-Q1, 2003/4*); #4 in: "Best metro for business & careers," based on educational attainment (*Forbes, 5/05*)



	<u>Circulation</u>		<u>Readership</u>	
	<u>Daily</u>	<u>Sunday</u>	<u>Daily</u>	<u>Sunday</u>
Total	459,418	499,115	DMA	1,119,266
DMA	433,327	470,650	Bay Area Buy Mkt Adults*	1,043,061
Bay Area Buy* Market	414,008	451,886	Average DMA HH Income	\$119,151
			DMA Reader Income	\$133.4 Billion
				\$139.0 Billion

**Newspaper Highlights**

- Newspaper is the medium that reaches the most upscale, high-end consumers in the San Francisco/Oakland/San Jose DMA. 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:

	<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>
Post Grad/Degree	160	86	65	Use AMEX card	130	91	82
Use Stock Broker	153	107	96	Own Mutual Funds	128	106	78
Mgr/Busn/Finc'l Occ.	138	122	53	Stay at hotel-business	122	111	75

- The San Jose Mercury News/Contra Costa Newspapers Bay Area Buy Market combination has the 3<sup>rd</sup>-largest daily newspaper circulation (459,418) in California and 3<sup>rd</sup> on Sunday (499,115), and has the largest circulation in the San Francisco/Oakland/San Jose Bay DMA Area, with coverage concentrated in Santa Clara and Contra Costa counties (*Circulation 2005*)
- In the DMA, there are more upscale daily readers of the San Jose Mercury News/Contra Costa Newspapers than those of the San Francisco Chronicle:

	<i>San Jose Mercury News/Contra Costa Newspapers</i>	<i>San Francisco Chronicle</i>		<i>San Jose Mercury News/Contra Costa Newspapers</i>	<i>San Francisco Chronicle</i>
Access the internet	885,626	858,258	Home Equity Loan	237,881	216,569
Home Value \$250M+	762,685	675,272	Own/lease Frgn Luxury Vehicle	187,992	183,434
HHI \$100,000+	431,855	404,188	Use Financial Planner	180,301	158,796

- A single issue of the Sunday San Jose Mercury News/Contra Costa Newspaper Bay Area Buy Market combination reaches 44% of Silicon Valley – a Sunday issue of the San Francisco Chronicle, in comparison, reaches only 11% of this market
- The San Jose Mercury News can be bought in combination with the Contra Costa Newspapers – 4 Sunday insertions in the SF Chronicle reach only 17% of the Bay Area Buy, but a schedule with 2 SF Chronicle and 2 Bay Area Buy reaches 58% of this market – a 241% increase at no additional cost
- The Sunday San Jose Mercury News/Contra Costa Newspaper Bay Area Buy Market combination 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:

<i>% Bay Area Buy Market Adults</i>		<i>% Metro Adults</i>
Daily SJ/CC Bay Area Buy Mkt	37%	A.M. Drive Time Radio (average ¼ hour, 78 stations)
Sunday SJ/CC Bay Area Buy Mkt	44%	Prime Time TV: ABC, CBS, FOX, and NBC
		21%
		14%

- On an average weekday, the San Jose Mercury News/Contra Costa Newspapers Bay Area Buy Market reaches over 410,000 Bay Area Buy households – over 5 times more households reached by Newsweek, Time, & U.S. News weekly magazines combined (77,214) (*ABC Audit, 9/28/03; ABC Magazine Market Coverage Report, 2004 - MSA*)
- Compared to the average adult in SF/San Jose/Oakland DMA, daily Bay Area Buy readers are:  
 171% more likely to have hm value \$200,000+      89% more likely to have post graduate degree+  
 115% more likely to have HHI \$75,000+            80% more likely to have an IRA  
 106% more likely to have broadband connection    78% more likely to have an on-line service
- Compared to the average adult in SF/San Jose/Oakland DMA, Sunday Bay Area Buy readers are:  
 134% more likely to take 3+ dom air trps-prs/vac    80% more likely to rent a car for pers'l/vacation  
 108% more likely to take 1+ dom air trps-busnss    65% more likely to have second home/property  
 92% more likely to visit Europe past 3 years        52% more likely to use a travel agent

Source: *Circulation 2005; Demographics USA 2004; Scarborough USA+ 2004, Rel 2; Scarborough 2005, Rel 1; ABC Audit Rpts, 9/28/03; Bay Area Buy: Santa Clara & Contra Costa Counties; zip codes in: Alameda County: 94536, 94538, 94539, 94580, 94551, 94555, 94560, 94566, 94568, 94586, 94587, 94588, 94706; in San Mateo County: 94025, 94027, 94028, 94303; in Solano County: 94510*