

The St. Louis Market



	<u>St. Louis DMA</u>		<u>St. Louis CBSA</u>	
	<u>#</u>	<u>U.S. Rank</u>	<u>#</u>	<u>Rank</u>
Households	1,251,700	#21	1,110,000	#18
Population	3,178,600	#21	2,811,100	#18
EBI	\$65.8 Billion	#23	\$60.2 Billion	#19
Retail Sales	\$50.2 Billion	#22	\$45.2 Billion	#19

Market Highlights

- St. Louis is Missouri's largest DMA and metro area, and is ranked as the 10th-largest market in geographic size at 6,394 square miles; a leading industrial and transportation center
- St. Louis has the lowest cost of living index in top 25 CBSAs, & 10% lower than the U.S. (*ACCRA 1st Qtr., 2008*), and the 2nd-most affordable housing market for % of homes affordable (*NAR, 2007, 4th qtr, top 20 CBSAs.*)
- St. Louis is home to 8 Fortune 500 firms, and ranked 6th in number of cities with most Fortune 500 corporate HQs: Emerson Electric, Express Scripts, Anheuser- Busch, Monsanto, Ameren, Charter Communications, Peabody Energy, and Graybar Electric; additional Fortune 1000 HQs: Solutia, Enginger Holdings, A.G. Edwards, Centene, Arch Coal, Brown Shoe, Ralcorp Holdings, Furniture Brands Int'l, Sigma-Aldrich, Belden, Laclede Group, & MEMC Electronics Materials (*Fortune, 4/08*)
- St. Louis is a leader in medical research, & home to 2 outstanding medical schools, including the St. Louis Medical School at Washington Univ., ranked as the #3 rated top U.S. research medical school (*USN&WR, 4/08*); over 100 hospitals/clinics, with approximately 75,000 employed in research & direct patient care; one of the top 10 US hospitals (#9–Barnes-Jewish Hosp./Washington Univ.) (*USN&WR, '07*)
- The BioBelt, a world-class center for plant and life sciences research, includes nearly 400 firms in the area with over 15,000 major & emerging employees, including: Monsanto, leader in agricultural biotech and genomics; Pfizer's biotech/R&D building a \$300 million research facility; Sigma-Aldrich chemicals completed a new downtown campus; Missouri Botanical Gardens; Centocor Biologics; Covidien Imaging; Forest Pharmaceuticals; KV Pharmaceuticals; GlaxoSmithKline; Solae Co.; new firms: Stereotaxi cardiology; Kereos; Divergence genomics; Orion genomics; and Sequoia Sciences
- Several new projects in 2007: Visteon's new facility; Abengoa Bioenergy and VeraSun Energy/ Visteon's new ethanol plants, Monsanto Corp., and American Family Insurance (*St. Louis RCGA., 2007*)
- 2nd-busiest inland U.S. port, and the nation's third-largest rail center; Lambert-St. Louis Int'l Airport, 33rd-busiest U.S. airport, served over 15 million passengers in 2007, with its third straight year of passenger growth; non-stop service to 72 national and int'l destinations (*ACI*); a \$1 billion expansion created a new 9,000 foot runway, completed in 2006; a \$100 million renovation project is underway
- New development: Interstate-64 reconstruction; I-70 Mississippi River Bridge; U.S. Steel & SunCoke Energy construction; new location/expansion includes: downtown St. Louis mixed use; Wachovia Securities/A.G. Edwards consolidation; Brown Shoe new HQs; Centene new HQs in Ballpark Village
- St. Louis is ranked as:
 - #3 "Top metro for attracting new and expanded corporate facilities in 2007," with 95 projects totaling over \$1.5 billion, creating 3,555 jobs in the metro area (*Site Selection, 3/08*)
 - #4 "Most affordable place to live well" for housing affordability, cost of living, quality of life (*Forbes, 2007*)
 - #5 "Top 5-star logistics metro" overall (*Expansion Management, '07*)
 - #5 "Best location for real estate investment" (*HomeVestors of America, 1st qtr '08*)
 - #6 "Most literate city" for booksellers, education, internet, libraries & newspapers (*Central CT State Univ '07*)
 - #7 "Most cost competitive location (2 million+) to do business- labor, facility, transportation" (*KPMG LLP 3/08*)
 - #9 "Best city for relocating families" in home prices, home appreciation, property taxes (*Primacy ERC, '07*)
 - #10 "Top city for U.S. life science R&D locations" (*Site Selection, 3/07*)

Source: Demographics USA, 2007:

The St. Louis Post-Dispatch Delivers The St. Louis Market

Newspapers First
THE LEADER IN MAJOR MARKETS



	<u>Circulation</u>			<u>Readership</u>	
	<u>Daily</u>	<u>Sunday</u>		<u>Daily</u>	<u>Sunday</u>
Total	277,259	421,022	Adults	655,348	1,054,699
DMA	260,802	397,145	College Grad+	193,054	295,636
CBSA	252,680	384,779	Professional/Mgrl	161,406	268,601
			HHI \$75,000+	280,682	427,761

Newspaper Highlights

- Newspaper is the medium that reaches the most upscale, high-end consumers in the St. Louis market. Heavy newspaper readers index far above heavy users of both TV and radio among the most valuable prospects in the St. Louis 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>
Own 2+ new cars	166	95	105	Own CDs	149	113	106
Use a travel agent	159	121	67	HHI \$100,000+	130	97	54
Upscale hotel-busn	151	122	59	Mkt value home \$250,000+	125	104	90

- The St. Louis Post-Dispatch has the 28th-largest daily and the 21st-largest Sunday newspaper circulation in the U.S.; largest newspaper in the state
- Daily circulation of 277,259 accounts for 31% of total Missouri's daily newspaper circulation; the Post-Dispatch's 421,022 Sunday circulation represents 38% of Missouri's total Sunday circulation
- The St. Louis Post-Dispatch is ranked 9th daily at 21% and 5th on Sunday at 32% in readership coverage, among the top newspapers in the top 21 DMA households
- Daily, the Post-Dispatch (260,802) offers DMA circulation nearly 3 times greater than the next 3 biggest newspapers combined – Belleville News Democrat, Alton Telegraph, and Centralia Morning Sentinel (92,158)
- Daily Post-Dispatch readers have an HHI 16% higher than the DMA average – a difference of nearly \$12,500; on Sunday, readers have an HHI 10% higher (over \$7,460) than average for DMA adults
- The St. Louis Post-Dispatch 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 (Scarborough 2008, Rel 1)

	<i>% CBSA Adults</i>		<i>% CBSA Adults</i>
Daily Post-Dispatch	29%	A.M. Drive Time Radio (average ¼ hour, 36 stations)	19%
Sunday Post-Dispatch	47%	Prime Time TV: ABC, CBS, FOX, NBC	17%
- On an average weekday, the St. Louis Post-Dispatch reaches over 252,680 metro households – over 3 times more households reached by Newsweek and Time weekly magazines combined (77,878) (Circulation 2008; ABC Magazine Market Coverage Report, 2006- MSA)
- Over 2 out of 3 adults (67%) who read a daily newspaper in St. Louis MSA turn to the Post-Dispatch, and over 8 out of 10 adults (82%) on Sunday
- Compared to the average adult in the U.S., daily St. Louis Post-Dispatch readers are:

50% more likely to own money market funds	35% more likely to travel to Europe
48% more likely to use a financial planner	28% more likely to rent a car for personal/vacation
44% more likely to own bonds	27% more likely to have post graduate degree+
- Compared to the average adult in the U.S., Sunday St. Louis Post-Dispatch readers are:

62% more likely to use a full service stockbroker	17% more likely to take 3+ dom pers/vac air trips
36% more likely to use an online service	17% more likely to have HHI \$75,000+
22% more likely to play golf	16% more likely to have a college degree+
- The stltoday.com website for the St. Louis Post-Dispatch is the area's most powerful local medium for effective online advertising, with over 910,000 unique visitors monthly (NAA/NAD Base, 8/07) (Circulation 2008; Scarborough 2008, Rel 1;