

SEATTLE MARKET OVERVIEW

Welcome to Seattle: the frontier to the future. The nation's 13th largest market is also its most wired and most literate, as well as the most likely to make purchases online.

An innovative spirit defines the lifestyle and the economy here: In fact, business magazine Fast Company has named Seattle its 2009 City of the Year, based on its "smarts, foresight, social consciousness and creative ferment." It's all part of what makes Seattle a superior place to live, work and advertise.

The Seattle Times



Results delivered daily.





ONLINE

SEATTLE IS A LEADER IN ONLINE ACTIVITY:

- Forbes.com has named Seattle the nation's most wired city for 2009, based on broadband access and usage and wi-fi availability.
- A higher percentage of local adults uses e-mail than in any other market in the country.
- 43% of adults in the region regularly read news online, while 21% read or contribute to blogs.
- The market ranks #1 for making online purchases, #2 for visiting auction Web sites and #3 for Internet access (by percent of adults).

TRAVEL & TOURISM

THE REGION IS A HUB FOR ARRIVALS AND DEPARTURES:

- The Seattle-Tacoma DMA ranks #1 in the country for percent of adults taking 5+ trips outside the continental U.S.
- The Seattle market also ranks #1 for general online travel purchases (not including airline tickets) and #2 for online airline ticket purchases (by percent of adults).
- Tourists in Washington spent \$15.7 billion in 2008.
- In 2009, a \$72 million cruise terminal opened to help serve the estimated 801,000 passengers who come through Seattle ports.

ARTS & CULTURE

ARTS OF EVERY TYPE THRIVE HERE:

- The Seattle metro ranks #1 in arts-related businesses per capita, according to the Americans for Arts Organization.
- Seattle currently ranks as the most literate city in the U.S., based on criteria such as libraries, bookstores, newspaper readership and more.
- The Seattle International Film Festival (SIFF) is the largest film festival in the U.S.
- The area boasts more than 40 arts and cultural organizations, eight major museums, 18 major performing arts venues and nine major live music stages.



MOST WIRED CITY IN THE U.S.



#1 FOR FREQUENT INT'L TRAVEL

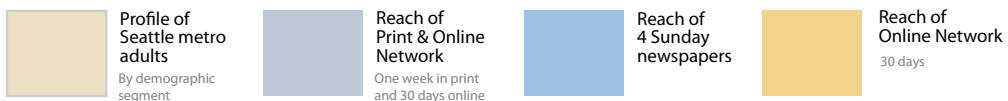


MOST LITERATE CITY IN THE U.S.



THE SEATTLE TIMES MEDIA NETWORK MARKET REACH

THE SEATTLE TIMES MEDIA NETWORK INCLUDES THE WEEKDAY AND SUNDAY SEATTLE TIMES NEWSPAPERS AND THE ONLINE NETWORK (seattletimes.com, NWjobs.com, NWautos.com, NWhomes.com and NWsource.com)



	1,997,300 100%	1,355,500 68%	1,108,200 56%	584,100 29%
Total Adults				
GENDER				
Men	50%	68%	53%	30%
Women	50%	67%	57%	28%
AGE				
18 – 34	28%	56%	35%	31%
35 – 54	42%	71%	58%	37%
55+	30%	76%	70%	18%
EDUCATION				
College graduate or more	36%	79%	64%	42%
Some college	34%	70%	60%	28%
High-school graduate or less	30%	53%	40%	16%
EMPLOYMENT STATUS				
Employed	68%	70%	55%	34%
Not employed	32%	64%	57%	18%
HOUSEHOLD INCOME				
\$100,000 or more	30%	73%	61%	37%
\$75,000 – \$99,999	20%	70%	58%	32%
\$50,000 – \$74,999	19%	67%	55%	29%
Less than \$50,000	31%	62%	49%	18%

	1,997,300 100%	1,355,500 68%	1,108,200 56%	584,100 29%
Total Adults				
TIME IN CURRENT RESIDENCE				
Less than five years	39%	61%	44%	31%
Five or more years	61%	72%	63%	28%
RACE				
White	85%	67%	56%	28%
Black/African-American	5%	66%	50%	24%
Asian	6%	77%	53%	46%
Other	4%	70%	56%	41%
MARITAL STATUS				
Married	58%	71%	58%	33%
Single/never married	28%	60%	45%	27%
Widowed/separated/divorced	14%	68%	63%	19%
CHILDREN IN HOUSEHOLD				
One or more	39%	66%	46%	35%
None	61%	69%	61%	26%
HOME OWNERSHIP				
Own	74%	71%	60%	31%
Rent or other	26%	61%	43%	25%

How to read: Of the 1,977,300 adults in King and Snohomish counties, 50% are men and 50% are women. Among the men, 68% read our newspaper in a week or access our online network in 30 days.

Over any four Sundays, 53% read The Sunday Seattle Times, and 30% access The Seattle Times Company Online Network over a 30-day period. Source: 2009 Scarborough Report, Release 1; Base: Seattle-Bellevue-Everett MD (1,977,300 adults)

THE SEATTLE TIMES PRINT AND ONLINE NETWORK REACHES NEARLY 7 OF 10 ADULTS IN THE SEATTLE METRO



GREEN LIVING

CARING FOR THE PLANET COMES NATURALLY HERE:

- The Seattle-Tacoma market ranks #3 for percent of adults owning hybrid vehicles.
- 53% of adults in the region say they drive less or use alternative forms of transportation to conserve energy.
- Seattle is the #3 market in the country for green purchases, with 43% of local adults buying environmentally friendly products.
- Washington state will receive \$38.5 million in federal stimulus funds for alternative energy projects.



3 FOR HYBRID OWNERSHIP

TRANSIT

A FOCUS ON USABLE MASS TRANSIT HELPS PEOPLE CONNECT:

- In 2009, Seattle opened the first 14 miles of a new light rail system that will connect Seattle-Tacoma Airport to the downtown core.
- Seattle ranks in the nation's top ten cities for public transit ridership.
- Washington state is home to the largest ferry system in the United States.
- Seattle's metropolitan bus system will soon include stations that provide real-time information on bus arrivals.



HIGH TRANSIT RIDERSHIP

EMPLOYMENT

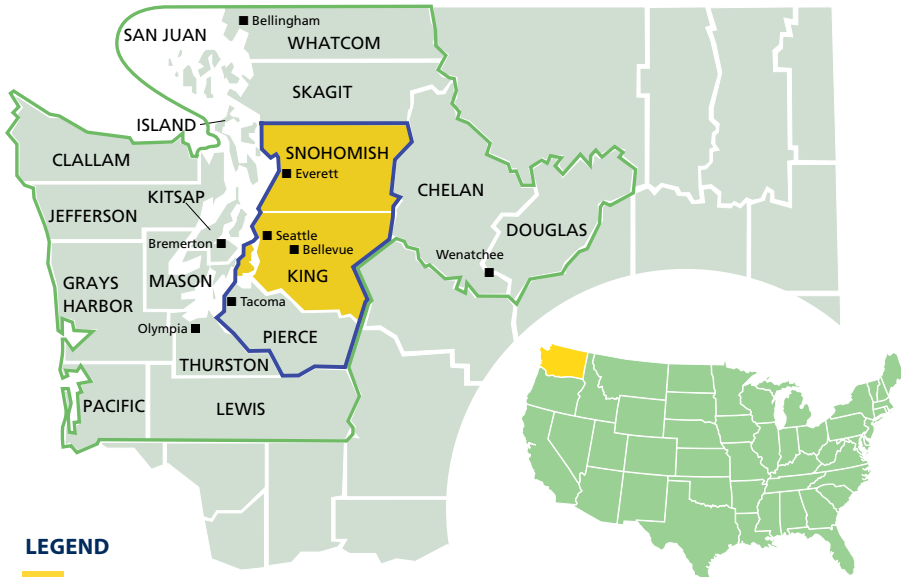
SEATTLE'S WORKFORCE IS POSITIONED FOR SUCCESS:

- According to Moody's Economy.com, Washington is one of the five states where job growth will return first, thanks in part to a high concentration of tech-related businesses.
- New Geography.com ranked Seattle #6 on their 2009 list of Best Large Cities for Job Growth — the highest city on the list not in Texas.
- Western Washington ranks #3 in the country for percent of adult residents who have attended college.



A TOP CITY FOR JOB GROWTH

MARKET MAP



LEGEND

- Seattle-Bellevue-Everett MD (Metropolitan Division)
- Seattle-Tacoma-Bellevue MSA (Metropolitan Statistical Area)
- Seattle-Tacoma DMA (Designated Market Area)

Notes: Seattle-Bellevue-Everett MD includes King and Snohomish counties. Seattle-Tacoma-Bellevue MSA includes King, Pierce and Snohomish counties. Seattle-Tacoma DMA includes King, Snohomish, Chelan, Clallam, Douglas, Grays Harbor, Island, Jefferson, Kitsap, Mason, Pacific, Pierce, San Juan, Skagit, Thurston and Whatcom counties.

POPULAR LEISURE ACTIVITIES

Percentage of total Seattle metro adults in past year

Activity	Total Adults	Percentage
Total Adults	1,997,300	100%
Gardening	1,083,600	54%
Photography	760,500	38%
Volunteering	649,300	33%
Casino gambling	630,000	32%
Swimming	618,100	31%
Camping	589,800	30%
Circuit training	521,800	26%
Bicycling	498,800	25%
Hiking/Backpacking	491,200	25%
Sewing/Crafts	474,000	24%
Bowling	447,200	22%
Jogging/Running	433,600	22%
Golf	308,700	16%
Boating	285,600	14%
Yoga/Pilates	279,400	14%
Fishing	266,600	13%
Skiing/Snowboarding	236,600	12%

EVENTS ATTENDED / PLACES VISITED

Percentage of total Seattle metro adults in past year

Event/Place	Total Adults	Percentage
Total Adults	1,997,300	100%
SPORTING EVENTS		
Any pro event	897,400	45%
Seattle Mariners	571,300	29%
College or high-school football	322,400	16%
Seattle Seahawks	223,100	11%
Emerald Downs race	135,700	7%
Everett Silvertips	77,800	4%
Everett AquaSox	61,600	3%
Seattle Thunderbirds	60,900	3%
Seattle Storm	52,500	3%

OTHER LOCAL PLACES OR EVENTS

Pike Place Market	839,600	42%
Museum	760,800	38%
Concert	664,900	33%
Zoo	653,600	33%
Live theater	625,100	31%
Casino	533,500	27%
Ski or golf resort	343,200	17%
Symphony /opera	250,300	13%
Dance performance	232,700	12%
Trade show	185,400	9%
Wild Waves	138,800	7%
Comedy club	117,000	6%
Recruitment fair	64,600	3%
Victoria Clipper	39,300	2%

How to read: Of the 1,997,300 adults in the Seattle-Bellevue-Everett MD, 1,083,600 (54%) enjoyed gardening in the past year. Note: Seattle-Bellevue-Everett MD (Seattle metro) refers to the Metropolitan Division, which includes King and Snohomish counties. Source: 2009 Scarborough Report, Release 1; Base: Seattle-Bellevue-Everett MD (1,997,300 adults)

Seattle-Tacoma DMA and Seattle-Tacoma-Bellevue MSA Markets

MARKET CHARACTERISTICS

	DMA TOTAL	DMA U.S. RANK	MSA TOTAL	MSA U.S. RANK	% OF DMA
Population	4,713,015	13	3,381,567	15	72%
Households	1,856,126	13	1,334,822	14	72%
Effective Buying Income	\$118,275,552,500	11	\$89,943,260,000	14	76%

RETAIL SALES VOLUME

	DMA TOTAL (\$000)	DMA U.S. RANK	MSA TOTAL (\$000)	MSA U.S. RANK	% OF DMA
Total Consumer Expenditures	\$96,460,059	11	\$71,177,694	14	74%
Automotive Dealers/Parts	\$23,375,877	11	\$17,250,245	14	74%
Health/Personal Care	\$11,902,401	13	\$8,628,743	15	72%
Food & Beverage Stores	\$11,101,619	12	\$8,198,113	15	74%
Food & Drinking Establishments	\$8,095,440	11	\$6,028,523	14	74%
Apparel/Accessories	\$7,472,992	11	\$5,625,530	15	75%
Electronics/Appliances	\$4,657,922	11	\$3,466,424	14	74%
Furniture/Home Furnishings	\$2,491,303	11	\$1,860,986	14	75%
Building/Hardware Materials	\$2,025,007	13	\$1,484,431	15	73%

How to read: There are 4,713,015 people residing in the Seattle-Tacoma DMA (Designated Market Area) or Western Washington, making it the 13th largest DMA in the United States, and 3,381,567 (72 percent) reside in the Seattle-Tacoma-Bellevue MSA (Metropolitan Statistical Area), making it the 15th largest MSA in the nation. Annual consumer expenditures in the Seattle-Tacoma DMA total \$96,460,059,000, ranking 11th among the nation's DMAs. 74% (\$71,177,694,000) of those consumer expenditures take place within the MSA.



LOCAL SPORTS TEAMS

- Seattle Mariners (MLB)
- Everett AquaSox (Minor League Baseball)
- Tacoma Rainiers (Minor League Baseball)
- Seattle Storm (WNBA)
- Seattle Seahawks (NFL)
- Seattle Thunderbirds (Minor League Hockey)
- Everett Silvertips (Minor League Hockey)
- Seattle Sounders FC (MLS)



IN THE MIDST OF A NATIONAL DOWNTURN, SEATTLE IS POISED FOR SUCCESS.

Seattle may be known for its gray skies, but it's proving to be a bright spot in the country's economic picture. Moody's Economy.com predicts that the Seattle metro, slow to enter recession, will also recover more quickly, consistently outperforming the nation for the next four years. Local forecasts for 2010 are also optimistic: The Puget Sound Economic Forecaster expects job growth to resume early in the year, while an already-above-average rate of personal income growth will continue to increase. These factors help contribute to a predicted increase in taxable retail sales, producing incremental growth between 2013 and 2020.

REAL ESTATE

- The 2009 PricewaterhouseCoopers Emerging Trends in Real Estate report ranks Seattle the #1 commercial real-estate investment market in the country.
- According to S&P/Case-Shiller's home price index, Seattle has experienced very few month-over-month declines in the past year — a key problem affecting most other markets.
- Several areas of the Seattle metro have less than a three-month supply of available single-family homes, a strong sign of the market's recovery.

BUSINESS & INDUSTRY

- In the first quarter of 2009, Seattle recorded the country's highest gain in the total value of locally produced goods and services.
- Washington is one of the top five states for innovation, according to the Kauffman Foundation, and holds the second most patents per capita.
- A new program called "Washington Grows," developed in partnership with Washington Manufacturing Services, aims to encourage and support local startup businesses, increasing revenue and adding jobs.

Arthur – Apparel and Accessories
Cabela's – Outdoor Retail
Crewcuts – Apparel and Accessories
Free People – Apparel and Accessories
Gucci – Apparel and Accessories
H&M – Apparel and Accessories
Hard Rock Café – Food and Beverage
Hermès – Apparel and Accessories
Jimmy Choo – Apparel and Accessories
Microsoft Retail Stores – Computer Hardware and Software
Neiman Marcus – Apparel and Accessories
Piazza Sempione – Apparel and Accessories
Salvatore Ferragamo – Apparel and Accessories
Silberman/Brown – Apparel and Accessories
Teavana Tea – Food and Beverage
Tesla Motors – Automotive
Tory Burch – Apparel and Accessories
True Religion – Apparel and Accessories

LOCAL COMPANIES

Amazon.com – E-commerce
Alaska Airlines – Airline
Attachmate – Enterprise Software
Big Fish Games – Computer Games
Blue Nile – Online Jewelry Retailer
Boeing* – Aerospace
Clearwire – Wireless ISP
Costco* – Warehouse Retail
drugstore.com – Online Pharmacy
Expedia – Online Travel
Fred Hutchinson Medical Research Center – Cancer Research
Getty Images – Stock Photography
Jones Soda – Beverages
Microsoft*† – Software Development
Nintendo – Gaming Software
Nordstrom*† – General Retail
Oberto Sausage Company – Food
Paccar – Trucking
RealNetworks – Software
Redhook Ale Brewery – Beverages
REI† – Outdoor Retail
Starbucks*† – Food and Beverage
T-Mobile† – Telecommunications
Trendwest/WorldMark – Travel
Tully's Coffee – Beverages
Trident Seafoods – Food
Weyerhaeuser – Forest Products
Zillow – Online Real Estate Information
Zymogenetics – Biotechnology

Seattle ranks as the nation's #2 high-tech center, behind only Silicon Valley, according to a report released by The Milken Institute in June 2009.



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