

chic orlando

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Inside:

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- * your perfect fit
and more!

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Metro Orlando is projected to grow more in population than any other Florida metro area.

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What's the best solution to meet your needs in Metro Orlando?

style market

- Over the past 10 years, Orlando has ranked third in population growth among the top 30 combined metro areas. This is higher than any other major Florida market.
- Over the next 10 years, Orlando's population growth will rank second with a growth rate of 23 percent.
- In the next five years, Metro Orlando is projected to grow more in population than any other Florida metro market.
- New residents tend to be young, single renters who have relocated here for employment opportunities.
- Hispanics are the fastest growing major segment of the population. Currently representing 21 percent of the metro area population, Hispanics will grow to 27 percent of the market (709,500) by 2015.

Sources: Woods & Poole Economics, 2005 MSA Profile; 2004 Belden Strategic Study; Market Statistics, Demographics USA 2004; U.S. Census Bureau; Orlando Sentinel Communications Marketing Services Division



Metro Orlando Demographic Changes 2000-2005

Orlando's Diverse Market

Total Retail Sales in the Metro Orlando area exceeds \$26 billion!

Tourism is back and gaining momentum!

The Housing Market is growing at a rapid pace and home values have increased significantly in the past 10 years.

Household Income levels in Metro Orlando have increased significantly over the past five years.

Racial & Ethnic Makeup of Metro Orlando is changing significantly, especially with a growing Hispanic population.

	2000		2005			
	Total Adults	% of Adults	Total Adults	% of Adults	Difference	% Change
Metro Orlando Adults	1,200,600	100%	1,427,900	100%	227,300	+19%
Men	583,000	49%	695,100	49%	111,700	+19%
Women	617,200	51%	732,800	51%	115,600	+19%
Age 18-34	381,800	32%	438,600	31%	56,800	+15%
Age 35-54	467,200	39%	563,300	40%	96,100	+21%
Age 55+	351,500	29%	425,900	30%	74,400	+21%
Median Age	43.5		44.3		0.8	+2%
Household Income Less Than \$30,000	320,800	27%	292,100	21%	-28,700	-9%
Household Income \$30-\$49,999	452,700	38%	419,200	29%	-33,500	-7%
Household Income \$50,000 or More	427,200	36%	716,600	50%	289,400	+68%
Household Income \$75,000 or More	232,400	19%	414,000	29%	181,600	+78%
Household Income \$100,000 or More	105,000	9%	208,200	15%	103,200	+98%
Median Household Income	\$41,500		\$50,200		\$8,700	+21%
Attended Some College or More	708,900	59%	792,000	56%	83,100	+12%
College Graduate or More	245,900	21%	341,100	24%	95,200	+39%
White-Collar Occupation	574,100	48%	651,300	46%	77,200	+13%
Blue-Collar Occupation	277,000	23%	323,200	23%	46,200	+17%
Retired	193,400	16%	212,000	15%	18,600	+10%
Working Women	390,600	33%	430,500	30%	39,900	+10%
Married	661,800	55%	807,100	57%	145,300	+22%
Not Married	538,800	45%	620,800	44%	82,000	+15%
Have Children in Household	449,200	37%	601,500	42%	152,300	+34%
Own Residence	790,000	66%	986,800	69%	196,800	+25%
Rent Residence	372,300	31%	369,600	26%	-2,700	-1%

Source: The 2000 and 2005 Scarborough Reports, Release 2

Household Income in Metro Orlando has increased significantly over the past five years.



How Orlando Has Changed

Between 2000 and 2005, Orlando's population jumped 19%. But the increase was even more pronounced in many key demographics.

More Population	+19% Metro Orlando Adults
More Affluent	+98% Households earning \$100,000+
More Educated	+39% College Graduates
More Families	+34% Have Children in Household
More Stability	+25% Homeowners
More Top Jobs	+13% White-Collar Occupations

Source: The 2000 and 2005 Scarborough Reports, Release 2

Metro Rankings: Select Upscale Categories

	Target Adult Population	% of Population	Index (vs. Top-40 Avg.)	Target Rank
Plan to Buy Next 12 Mos: Primary House/Condo-Existing/New Construction	133,200	9.6%	145	1
Type of Cable Service Household Subscribers To: Digital Cable	461,000	33.1%	122	2
Attended Past 12 Months: Arts & Crafts Fair or Festival	402,300	28.9%	120	2
Items Household Owns: Pool or Spa	298,300	21.4%	179	2
Took Cruise (Past 3 Years)	357,100	25.7%	183	2
Model Type of Any Domestic Vehicle Owned or Leased: Luxury	107,400	7.7%	145	3
Apparel Items Bought Past 12 Months: Fine Jewelry	343,500	24.7%	120	3
Amount Household Plans to Pay for New Vehicle Next 12 Months: \$30,000+	59,700	4.3%	138	4
Used Any Credit Card Past 3 Months	1,121,900	80.6%	106	4
Investments Household Has: Second Home or Real Estate Property	171,600	12.3%	119	4
Purchased Camera or Accessories: Spent \$500 or More	69,200	5.0%	128	4
Household Uses Broadband Internet Connection	480,000	34.5%	120	6
Detailed Occupation Codes: Management	142,000	10.2%	121	7
Wireless/Cell Phone Bill Amount Last Month: \$100 or More	155,400	11.2%	117	9
Purchased Carpeting or Floor Covering: Spent \$3,000 or More	50,900	3.7%	117	10

Among the Top-40 Metro markets in the nation
(Orlando ranks 28th in adult population)
Source: The 2004 Scarborough Multi-Market Report, Release 2

Home Value Trend in Metro Orlando

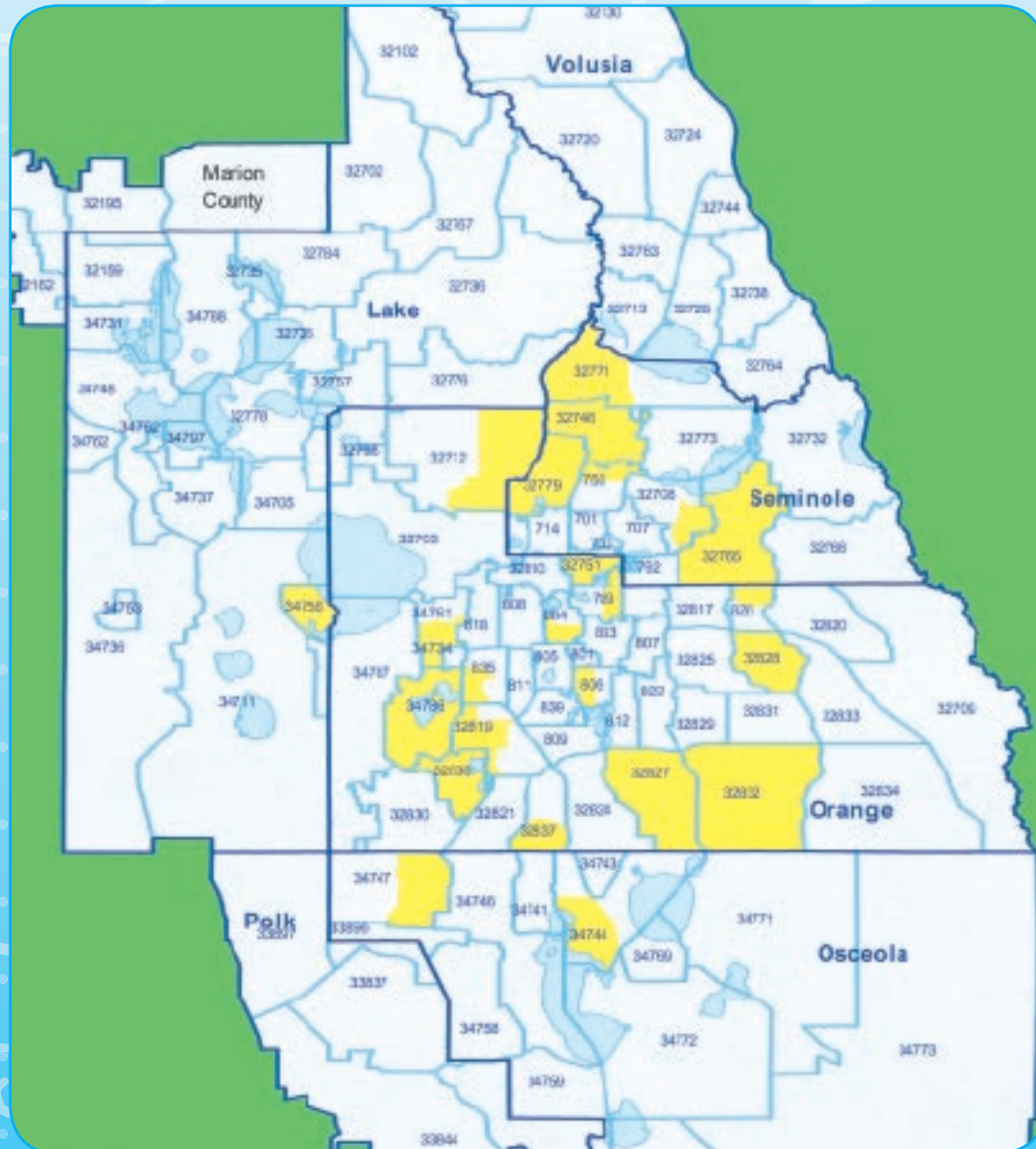
	1995	% of Home Owners	2000	% of Home Owners	2005	% of Home Owners	1995-2005 Increase	% Gain /Loss
Metro Adults/Homeowners	698,500	100%	775,600	100%	981,800	100%	+283,300	+41%
Market Value of Owned Home								
Under \$50,000	94,500	14%	90,500	12%	59,900	6%	-34,600	-37%
\$50,000-\$99,999	330,500	47%	276,500	36%	125,100	13%	-205,400	-62%
\$100,000-\$149,000	160,200	23%	212,100	27%	219,700	22%	+59,500	+37%
\$150,000-\$199,999	49,700	7%	88,000	11%	224,000	23%	+174,300	+351%
\$200,000-\$249,999	36,000	5%	43,100	6%	130,300	13%	+94,300	+262%
\$250,000-\$299,999	12,400	2%	29,900	4%	63,500	6%	+51,100	+412%
\$300,000-\$349,999	7,800	1%	11,200	1%	51,800	5%	+44,000	+564%
\$350,000-\$499,999	2,200	<1%	14,500	2%	62,000	6%	+59,800	+2718%
\$500,000-\$999,999	4,700	1%	7,800	1%	35,900	4%	+31,200	+664%
\$1,000,000 or more	500	<1%	2,000	<1%	9,500	1%	+9,000	+1800%
\$250,000 or more	27,600	4%	65,400	8%	222,700	23%	+195,100	+707%
\$350,000 or more	7,400	1%	24,300	3%	107,400	11%	+100,000	+1351%
\$500,000 or more	5,200	1%	9,800	1%	45,400	5%	+40,200	+773%
Average Value of Owned Home	\$107,000		\$132,500		\$217,300		+\$110,300	+103%
Median Value of Owned Home	\$89,300		\$104,500		\$169,200		+\$79,900	+89%

Home value in Metro Orlando has increased significantly over the past ten years.

Source: The Scarborough Report; 1995, 2000 Release 1, 2005 Release 1

Orlando Sentinel
Primary Market Area

PMA Insert Zones with
Market Index of 110 or More

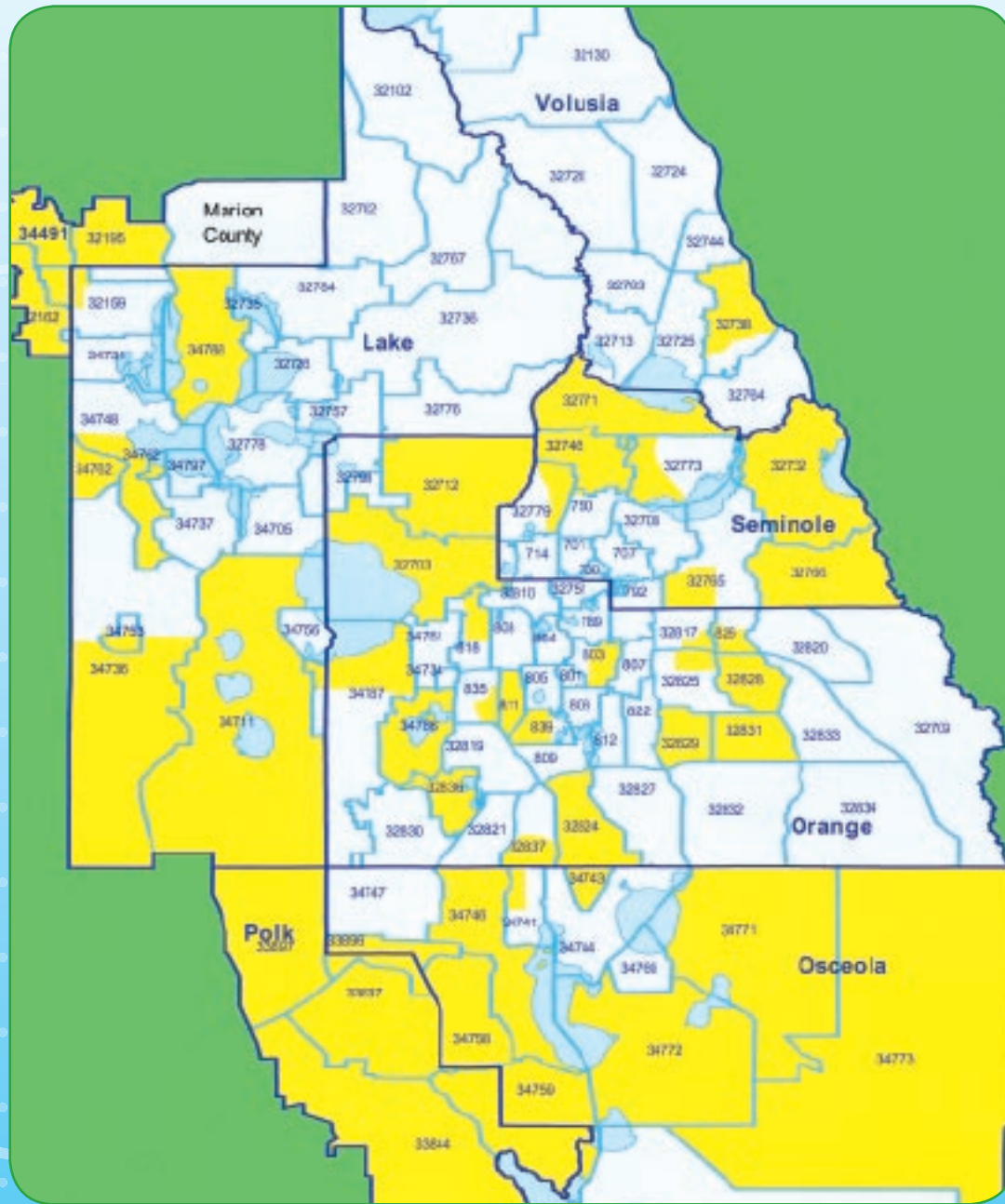


Top Income Areas in the Orlando Market

Insert Zone	City/Area Name	2004 Average Household Income
Total PMA		\$69,437
32779E	Longwood W./Wekiva	\$147,118
34786	Windermere	\$143,528
32789E	Winter Park W.	\$124,151
32751SE	Maitland	\$120,219
32819SW	Sand Lake/Bay Hill	\$114,055
32836N	Dr. Phillips/Bay Vista	\$113,835
32819NW	Sand Lake/Bay Hill	\$112,480
32779C	Longwood W./Wekiva	\$111,642
34747NE	Kissimmee Lk Wilson	\$110,372
34761S	Ocoee	\$110,218
32826N	Research Pk/Bonneville	\$104,922
32835SW	Metrowest/Orlo Vista	\$103,830
32765SW	Oviedo	\$102,789
32708NE	Winter Springs	\$102,485
32819SC	Sand Lake/Bay Hill	\$101,537
32708SE	Winter Springs	\$99,716
32779W	Longwood W./Wekiva	\$98,632
32765NW	Oviedo	\$94,250
32827	Airport/Lake Nona	\$93,314
32771W	Sanford N	\$91,500
32712E	Apopka N	\$89,985
32746W	Lake Mary	\$89,838
32837S	Hunters Creek/Southchase	\$87,127
32804S	College Park	\$86,192
32750N	Longwood N	\$85,629
32765SE	Oviedo	\$84,666
32751SW	Maitland	\$84,241
32765EC	Oviedo	\$81,349
32806W	Delaney	\$81,264
34761C	Ocoee	\$80,137
34744SW	Kissimmee E	\$79,647
32828N	Waterford Lakes	\$79,147
32828S	Waterford Lakes	\$79,147
32765NE	Oviedo	\$77,365
32746E	Lake Mary	\$77,023
34756	Montverde	\$76,573

Source: Census-2004 Estimates; Orlando Sentinel
Communications Marketing Services Division

Growth Areas in the Orlando Market



PMA Insert Zones that are projected to grow by at least 2,000 in population from 2004-2009 at a rate of at least 10%

*Baldwin Park community will have approximately 3,600 homes at buildout - over the next few years.

Insert Zone		2004 Proj Pop	2009 Proj Pop	Diff.	% Change
32162	The Villages (Sumter/Marion)	6,833	9,823	+2,990	+44%
34711S	Clermont	17,894	25,666	+7,772	+43%
34759	Poinciana S	11,152	15,983	+4,831	+43%
34758	Poinciana N	19,561	27,298	+7,737	+40%
32828S	Waterford Lakes	23,933	32,674	+8,741	+37%
32828N	Waterford Lakes	7,965	10,874	+2,909	+37%
32771W	Sanford	10,678	14,320	+3,642	+34%
32159W	Lady Lake/The Villages	23,498	31,194	+7,696	+33%
34746S	Kissimmee W/Pleasant Hill	13,155	17,434	+4,279	+33%
34787N	Winter Garden	26,905	35,518	+8,613	+32%
32835SE	Metrowest/Orlo Vista	9,937	13,065	+3,128	+31%
32824S	Taft/Meadow Woods	7,380	9,687	+2,307	+31%
34711C	Clermont	22,285	29,030	+6,745	+30%
32746E	Lake Mary	7,595	9,774	+2,179	+29%
34736S	Groveland S	10,935	14,052	+3,117	+29%
34746N	Kissimmee W/Pleasant Hill	10,836	13,906	+3,070	+28%
34711N	Clermont	13,694	17,556	+3,862	+28%
32765SW	Oviedo	12,339	15,770	+3,431	+28%
32836N	Dr. Phillips/Bay Vista	14,294	18,179	+3,885	+27%
32837S	Hunters Creek/Southchase	19,009	23,930	+4,921	+26%
32773W	Sanford	22,313	27,921	+5,608	+25%
34772	Canoe Creek	11,364	14,087	+2,723	+24%
34741NW	Kissimmee Central	13,408	16,617	+3,209	+24%
32817SE	University	11,015	13,629	+2,614	+24%
34491	Summerfield (Marion)	25,287	31,164	+5,877	+23%
32824N	Taft/Meadow Woods	17,283	21,296	+4,013	+23%
34748S	Leesburg W	12,536	15,331	+2,795	+22%
32825NE	Rio Pinar/Union Park	14,885	18,167	+3,282	+22%
32779E	Longwood W/Wekiva	10,924	13,288	+2,364	+22%
34786	Windermere	10,840	13,091	+2,251	+21%
34743	Buena Ventura Lakes	31,419	37,838	+6,419	+20%
32712W	Apopka	16,014	19,077	+3,063	+19%
32738N	Deltona	13,272	15,709	+2,437	+18%
32766	Chuluota	15,048	17,799	+2,751	+18%
32712E	Apopka N	17,176	20,177	+3,001	+17%
34771	Narcoossee	13,399	15,641	+2,242	+17%
327711E	Sanford N	26,628	30,951	+4,323	+16%
34747S	Kissimmee Lake Wilson	59,650	69,263	+9,613	+16%
32829	Chickasaw	13,802	15,991	+2,189	+16%
32811	Richmond Heights	37,815	43,732	+5,917	+16%
32826S	Research Park/Bonneville	15,264	17,484	+2,220	+15%
34788	Leesburg E	17,692	20,126	+2,434	+14%
32746W	Lake Mary	26,317	29,784	+3,467	+13%
32738C	Deltona	19,984	22,500	+2,516	+13%
32839W	Holden Park	40,408	45,428	+5,020	+12%
32818NE	Pine Hills W	17,914	20,069	+2,155	+12%
32703W	Apopka S	38,088	42,445	+4,357	+11%
32803E	Colonialtown/Baldwin Park	4,149	N/A*	N/A*	N/A*

Source: Census-2004 Estimates; Orlando Sentinel Communications Marketing Services Division

Hispanic Population By Florida Metro Area

Florida Metro/Metro Division*	2004 Total Population	2004 Hispanic Population	% of Total
Miami-Miami Beach-Kendall	2,386,766	1,460,928	61.2%
Fort Lauderdale-Pompano Beach-Deerfield Beach	1,770,945	371,321	21.0%
Orlando	1,837,405	361,207	19.7%
Tampa-St. Petersburg-Clearwater	2,563,395	315,562	12.3%
West Palm Beach-Boca Raton-Boynton Beach	1,252,675	192,878	15.4%
Naples-Marco Island	291,978	68,372	23.4%
Cape Coral-Fort Myers	499,496	61,087	12.2%
Lakeland-Winter Haven	512,421	60,346	11.8%
Sarasota-Bradenton-Venice	651,983	53,945	8.3%
Jacksonville	1,218,481	52,105	4.3%
Deltona-Daytona Beach-Ormond Beach	471,227	38,694	8.2%
Port St. Lucie-Fort Pierce	353,524	33,094	9.4%
Palm Bay-Melbourne-Titusville	508,027	27,952	5.5%
Ocala	280,450	20,142	7.2%
Tallahassee	340,489	13,285	3.9%
Gainesville	242,986	13,253	5.5%
Pensacola-Ferry Pass-Brent	437,053	10,814	2.5%
Vero Beach	122,992	9,506	7.7%
Fort Walton Beach-Crestview-Destin	183,009	8,227	4.5%
Punta Gorda	158,790	5,945	3.7%
Panama City-Lynn Haven	156,286	3,554	2.3%

*Miami-Fort Lauderdale-West Palm Beach Metro is broken down into three Metro Divisions
Source: Woods & Poole Economics, 2004 MSA Profile

Metro Orlando's Hispanic Population

	Total Hispanics	% of MSA Population	Growth vs. 1990
1990	103,900	8.4%	---
1994	160,003	11.5%	+54%
2000	277,619	16.8%	+167%
2004	361,207	19.7%	+248%
2014 Proj.	574,079	25.3%	+453%

Source: Woods & Poole Economics, 2004 MSA Profile

Orlando's Hispanic National Buying Power

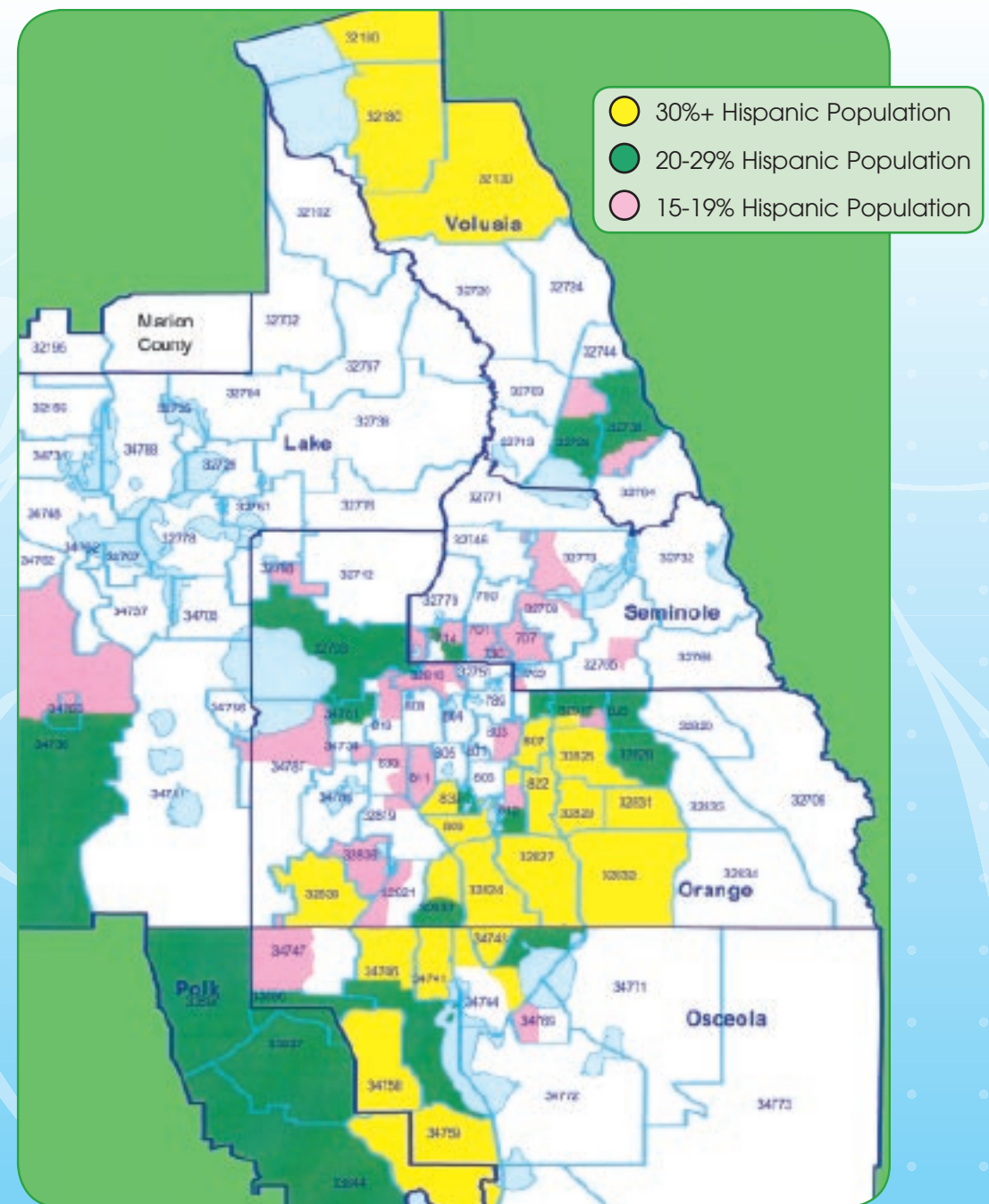
Rank	Designated Market Area	Per Capita Buying Income
1	Miami	\$11,169
2	Tampa/St. Petersburg	\$11,057
3	Washington D.C.	\$10,876
4	Orlando	\$10,384
5	New York	\$10,328
6	Boston	\$10,198
7	Albuquerque	\$9,935
8	San Francisco	\$9,832
9	Austin	\$9,832
10	San Diego	\$9,580

Orlando is a Top-5 market in Per Capita Hispanic Buying Power.

Source: Strategy Research Corporation

High Concentration Areas of Hispanic Pop.

Insert Zone	City/Area Name	2004 Hispanic Pop.	% of Total Pop.
34743	Buena Ventura Lakes	20,347	65%
34741NW	Kissimmee Central	7,618	57%
32824S	Taft/Meadow Woods	3,970	54%
32822NE	Ventura	6,157	52%
32824N	Taft/Meadow Woods	8,658	50%
34741NE	Kissimmee Central	7,424	50%
32807S	Azalea Park	6,220	47%
34759	Poinciana S	5,243	47%
32825NW	Rio Pinar/Union Park	6,032	46%
34744SE	Kissimmee E	2,497	45%
32836S	Dr. Phillips/Bay Vista	31	45%
32837N	Hunters Creek/Southchase	3,777	45%
32822NW	Ventura	8,638	43%
32809W	Pinycastle/Oak Ridge S	4,955	43%
32807N	Azalea Park	7,742	42%
34741SW	Kissimmee Central	2,568	42%
34758	Poinciana N	8,119	42%
32130	DeLeon Springs	4,763	41%
32822SE	Ventura	3,055	40%
32825NE	Rio Pinar/Union Park	5,864	39%
34741SE	Kissimmee Central	1,691	38%
32822SW	Ventura	4,670	37%
32827	Airport/Lk Nona	1,592	35%
34744NW	Kissimmee E	4,825	35%
32825SE	Rio Pinar/Union Park	2,315	34%
32837C	Hunters Creek/Southchase	4,326	34%
32829	Chickasaw	4,694	34%
32812N	Conway	5,401	33%
32809E	Pinycastle/Oak Ridge S	3,984	33%
32817SW	University	2,345	33%
34746N	Kissimmee W./Pleasant Hill	3,421	32%
32839W	Holden Park	12,628	31%
32825SW	Rio Pinar/Union Park	3,082	31%
32738S	Deltona	1,070	19%
32792NW	Winter Park E	868	19%
34787N	Winter Garden	5,060	19%
32714NE	W. Altamonte	2,644	19%
32725NW	Deltona	1,281	18%
32835NE	Metrowest/Orlo Vista	908	18%
34747NW	Kissimmee Lk Wilson	456	18%
32725NE	Deltona	1,052	18%
34769W	St. Cloud	1,944	17%
34734	Gotha	925	17%
32819NE	Sand Lake/Bay Hill	1,239	17%
32701S	E. Altamonte	2,244	17%
32817SE	University	1,876	17%
32836N	Dr. Phillips/Bay Vista	2,396	17%
32835NW	Metrowest/Orlo Vista	1,672	17%
32730	Fern Park	924	17%
32810NE	Lockhart	2,001	17%
32812C	Conway	2,179	17%
32810SW	Lockhart	2,010	17%
32821W	Williamsburg/Lk Bryan	1,003	16%
34736N	Groveland N	573	16%
32765EC	Oviedo	2,076	16%
32811	Richmond Heights	6,113	16%
32818NE	Pine Hills W	2,872	16%
32810NW	Lockhart	590	16%
32708NW	Winter Springs	1,107	16%
32703E	Apopka S	1,934	16%
32707S	Casselberry	2,911	16%
32798	Zellwood	512	15%
32701N	E. Altamonte	1,528	15%
32803E	Colonialtown	1,278	15%
32835SE	Metrowest/Orlo Vista	1,489	15%
32773W	Sanford S	3,288	15%
32707N	Casselberry	2,325	15%



Insert Zone	City/Area Name	2004 Hispanic Pop.	% of Total Pop.
32714SE	W. Altamonte	2,849	29%
32812S	Conway	1,456	27%
32792SE	Winter Park E	4,603	27%
34744NE	Kissimmee E	1,470	26%
32714NW	W. Altamonte	934	26%
32725SW	Deltona	2,417	25%
32828S	Waterford Lakes	5,958	25%
32828N	Waterford Lakes	1,983	25%
32725SE	Deltona	4,171	25%
32817NW	University	2,406	22%
32837S	Hunters Creek/Southchase	4,215	22%
32826S	Research Pk/Bonneville	3,350	22%
32817NE	University	2,538	22%
34761N	Ocoee	3,710	22%
34736S	Groveland S	2,386	22%
32839E	Holden Park	1,187	22%
34746S	Kissimmee W./Pleasant Hill	2,795	21%
32738N	Deltona	2,793	21%
32703W	Apopka S	8,011	21%
32738C	Deltona	4,172	21%
32826N	Research Pk/Bonneville	1,240	20%
34747S	Kissimmee Lk Wilson	12,106	20%

Orlando Sentinel Primary Market Area

Source: Census-2004
Claritas Estimates; Orlando
Sentinel Communications
Marketing Services Division

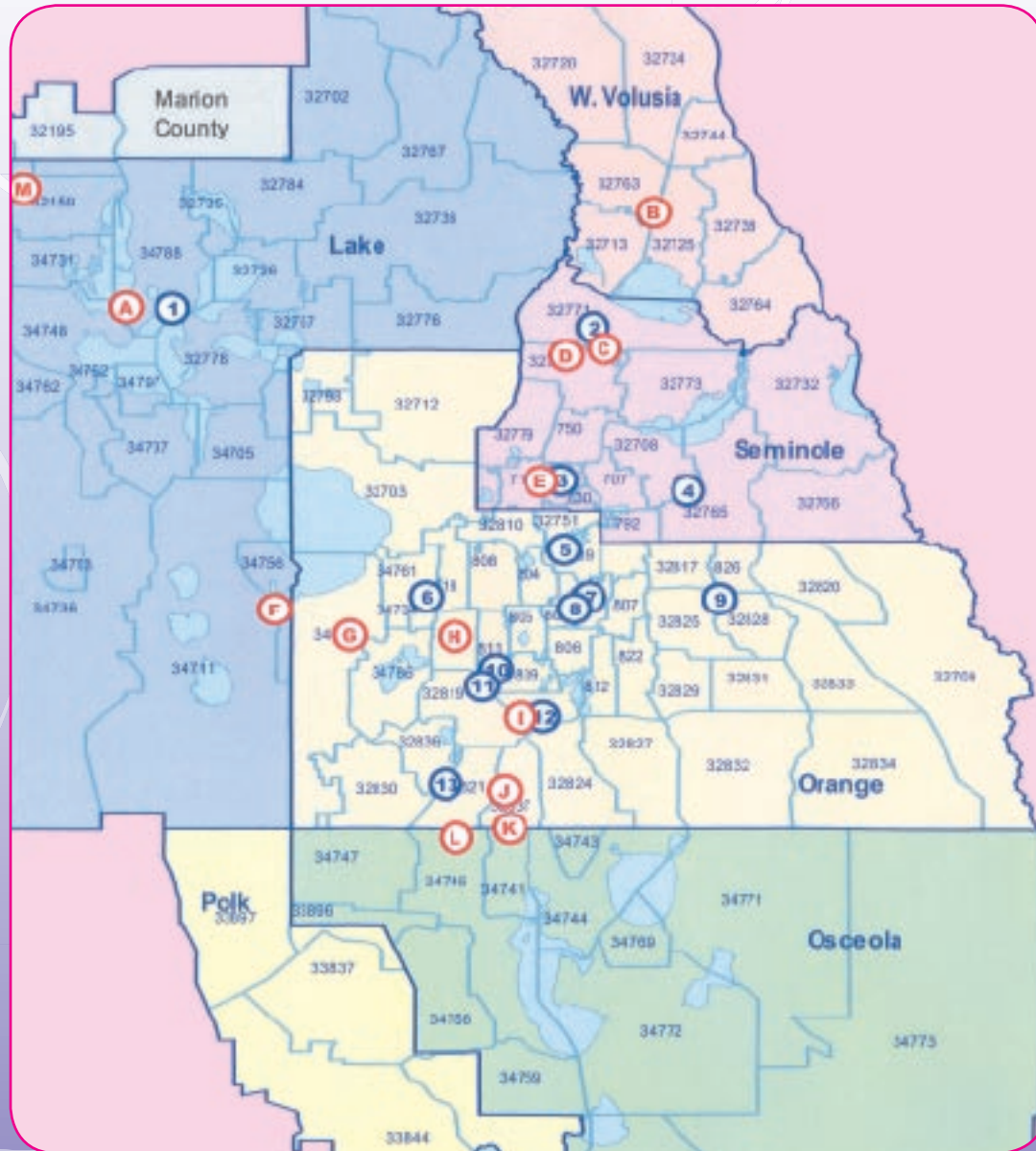


trend alert

- * Orlando is one of the nation's top retail growth markets. Retail sales have grown 95 percent in the past 10 years.
- * Orlando ranks 2nd among the top markets* in projected retail growth over the next 10 years (with a 76 percent sales increase expected).
- * The past 10 years have seen major changes in the Orlando area retail landscape. 2002 was a milestone year for retail expansion with an influx of upscale retailers entering the market. In 2005-2006, the momentum continues with the building of major new shopping areas in growth pockets of the market and major new retailers (such as Kohl's) opening multiple stores.

*Among the top 30 combined and metro areas in 2005 population
Source: Woods & Poole Economics, 2005 MSA Profile

Orlando's Major Shopping Areas



Existing Shopping Areas

- 1 Lake Square Mall
- 2 Seminole Towne Center
- 3 Altamonte Mall
- 4 Oviedo Marketplace
- 5 Winter Park Village
- 6 West Oaks Mall
- 7 Orlando Fashion Square
- 8 Colonial Plaza
- 9 Waterford Lakes Town Center
- 10 Mall at Millenia
- 11 Prime Outlets/Festival Bay
- 12 The Florida Mall
- 13 Orlando Premium Outlets

New/Upcoming Shopping Areas

- A Leesburg Market Center
- B West Volusia Towne Center
- C Marketplace at Seminole Towne Center (open)
- D Colonial TownPark (open)
- E Altamonte Town Center
- F Plaza Collina
- G Winter Garden Village at Fowler Groves
- H Veranda Park
- I Orlando Square (open)
- J West Park Town Center
- K The Loop (open)
- L Osceola Trace
- M Rolling Acres Plaza



New Retailers in the Orlando Area 2002-2005

Ashley Furniture Homestore	2002
BJ's Wholesale Club	2002
Bloomingdale's	2002
Burberry	2002
Cartier	2002
Crate and Barrel	2002
EXPO Design Center	2002
Gucci	2002
Havertys Furniture	2002
Lord & Taylor	2002
Macy's	2002
Neiman Marcus	2002
Nordstrom	2002
Tiffany	2002
American Signature Home	2003
Wal-Mart Neighborhood Market	2003
Baer's Furniture	2004
Cost Plus World Market	2004
McRae's	2004
Fitzgerald's Fine Furniture	2005
Lane Home Furnishings	2005
HomeGoods	2005
Kohl's	2005

Orlando – A Projected Leader in Retail Sales Growth

Rank*	Major Market	Total Retail Sales**		2005-2015 Change	
		2005	2015	Number*	Percent
1	Phoenix	\$52,935,292	\$93,455,686	\$40,520,394	76.5%
2	Orlando	\$31,032,036	\$54,452,344	\$23,420,308	75.5%
3	Sacramento	\$26,221,799	\$45,698,537	\$19,476,738	74.3%
4	Denver/Boulder	\$40,172,422	\$67,525,581	\$27,353,159	68.1%
5	Dallas/Fort Worth	\$85,300,447	\$143,353,478	\$58,053,031	68.1%
6	Atlanta	\$74,899,962	\$125,705,154	\$50,805,192	67.8%
7	San Diego	\$36,604,681	\$61,312,563	\$24,707,882	67.5%
8	Miami/ Ft. Lauderdale/ W. Palm Beach	\$83,674,372	\$140,135,147	\$56,460,775	67.5%
9	San Antonio	\$22,023,095	\$36,414,332	\$14,391,237	65.3%
10	Charlotte	\$28,984,889	\$47,826,025	\$18,841,136	65.0%
Florida		\$252,293,451	\$424,125,406	\$171,831,955	68.1%
Southeast		\$953,119,200	\$1,538,058,837	\$584,939,637	61.4%
United States		\$3,801,326,976	\$6,014,023,611	\$2,212,696,635	58.2%

Metro Orlando will be a top market leader
in retail sales growth through 2015.

*2005-2015 percent change; among top 30 combined
and metro areas in 2005 population
**In thousands of current year dollars
Source: Woods & Poole Economics, 2005 MSA Profile



Shopper Share Trend of Top 5 Major Shopping Areas/Malls

Any mall or major shopping area
shopped in last 3 mos.

	2001	2002	2003	2004	2005
	1,148,100	1,216,400	1,226,400	1,311,600	1,226,000
The Florida Mall	40%	45%	41%	40%	46%
The Mall at Millenia	N/A	N/A	21%	28%	34%
Orlando Fashion Square	31%	38%	32%	33%	30%
Altamonte Mall	28%	35%	34%	31%	29%
Prime Outlets (formerly Belz Factory Outlet World)	22%	24%	21%	17%	22%

Source: The 2001-2005 Scarborough Reports, Release 2



Mall at Millenia Shopper Demographics

	Total Adults	Shopped Mall at Millenia	Index
Metro Orlando Adults	1,427,900	417,100	
Men	49%	45%	92
Women	51%	55%	108
Age 18-34	31%	35%	113
Age 35-54	40%	45%	113
Age 55+	30%	21%	70
Median Age (years)	44.3	41.3	93
Household Income Less Than \$30,000	21%	13%	63
Household Income \$30-\$49,999	29%	23%	77
Household Income \$50,000 or More	50%	64%	128
Household Income \$75,000 or More	29%	42%	143
Household Income \$100,000 or More	15%	20%	136
Median Household Income	\$50,200	\$65,700	131
Attended Some College or More	56%	67%	121
College Graduate or More	24%	34%	141
White-Collar Occupation	46%	52%	115
Blue-Collar Occupation	23%	17%	77
Retired	15%	12%	81
Working Women	30%	34%	114
Married	57%	65%	115
Not Married	44%	35%	81
Have Children in Household	42%	51%	121
Own Residence	69%	68%	99
Rent Residence	26%	28%	107

Shopped in the past 3 months
Source: The 2005 Scarborough Report, Release 2



sentinel savvy

✿ The Orlando Sentinel ranks 13th for metro market coverage among newspapers with daily adult readership over 500,000.

✿ The Orlando Sentinel ranks 16th for metro market coverage among newspapers with Sunday adult readership over 500,000.

✿ One Sunday ad in the Orlando Sentinel reaches more people than a television ad airing in every available time slot during network primetime, every day of the week, on any of the local network stations.

✿ One Sunday ad in the Orlando Sentinel reaches more people than a radio ad airing in every available time slot during the week 6 AM-12 MID on any of the top four stations.

Source: 2004 Scarborough Reports, Release 2
The 2005 Scarborough Report, Release 2

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Orlando Sentinel + OrlandoSentinel.com

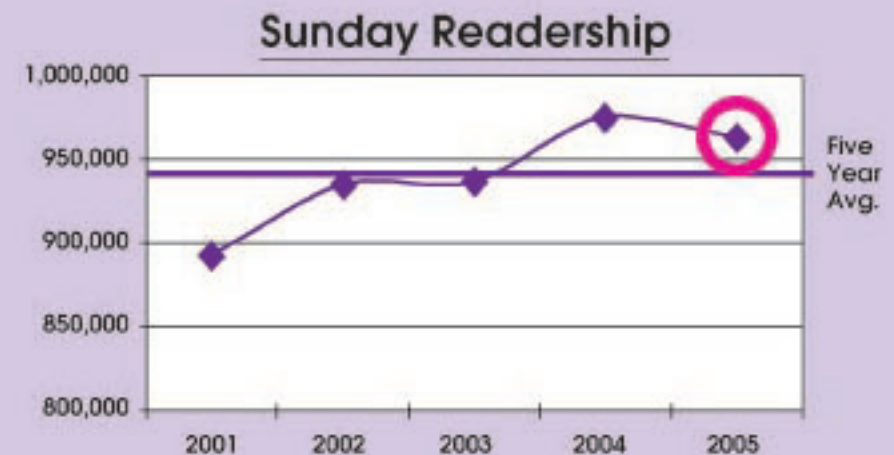
The Orlando Sentinel reaches upscale adults:

	Total Adults	Avg Daily	5-Daily Cume	Avg Sun	4-Sun Cume	7-Day Cume	1 Daily + 1 Sun	OS.com	1 Daily + 1 Sun + OS.com
Metro Orlando Adults	1,427,900	40%	61%	59%	76%	71%	64%	19%	69%
Household has any investments	827,100	47%	66%	64%	80%	76%	70%	20%	74%
Occupation - White Collar	651,300	41%	65%	62%	77%	75%	68%	27%	73%
Household Income - \$75,000 or more	414,000	48%	67%	70%	83%	79%	75%	22%	78%
Occupation - Management/Professional	387,200	40%	66%	61%	78%	76%	67%	28%	72%
College Graduate or more	341,100	46%	69%	66%	83%	77%	70%	27%	74%
Market value of owned home - \$250,000 or more	268,500	52%	71%	71%	86%	81%	76%	21%	79%
Any store shopped for fine jewelry past 12 mos.	246,800	46%	66%	68%	83%	75%	71%	22%	79%
Own Luxury Vehicle	140,700	47%	66%	65%	82%	71%	67%	20%	71%

Source: The 2005 Scarborough Report, Release 2

Orlando Sentinel Readership Trend

	2001	2002	2003	2004	2005	5-Yr Avg	2005 vs Avg
Daily Orlando Sentinel	609,200	639,800	623,300	682,800	712,800	653,600	+ 9.1%
Sunday Orlando Sentinel	892,500	934,500	936,300	974,600	961,900	940,000	+ 2.3%



Recent readership of the Orlando Sentinel shows strong gains versus the five year average.

Source: The 2001-2005 Scarborough Reports, Release 1 (DMA)

Orlando Sentinel Daily Market Coverage

The Orlando Sentinel ranks 13th for metro market coverage among newspapers with daily adult readership over 500,000.

Newspaper	Market	Adult Daily Readership	Percent Coverage	Rank
New Orleans Times-Picayune	New Orleans/Metairie/Kenner MSA	571,400	58.5%	1
Newsday	Suffolk County/Nassau County MD	1,182,900	56.1%	2
Milwaukee Journal Sentinel	Milwaukee/Waukesha/West Allis MSA	570,400	50.6%	3
Cleveland Plain Dealer	Cleveland/Elyria/Mentor	814,500	50.4%	4
Washington Post	Washington, DC/Arlington/Alexandria MSA	1,791,000	46.7%	5
Portland Oregonian	Portland/Vancouver/Beaverton MSA	712,600	46.5%	6
San Jose Mercury News	San Jose/Sunnyvale/Santa Clara MSA	604,800	45.0%	7
Indianapolis Star	Indianapolis MSA	511,300	43.5%	8
Columbus Dispatch	Columbus (OH) MSA	534,300	42.4%	9
Newark Star-Ledger	Newark/Union MD	675,200	41.9%	10
Sacramento Bee	Sacramento/Arden/Arcade/Roseville MSA	597,600	41.4%	11
San Francisco Chronicle	San Francisco/San Mateo/Redwood City MD	596,200	40.9%	12
Orlando Sentinel	Orlando MSA	565,400	40.6%	13
San Antonio Express-News	San Antonio MSA	529,800	40.0%	14
Arizona Republic	Phoenix/Mesa/Scottsdale MSA	1,004,100	37.8%	15
Kansas City Star	Kansas City MSA	524,400	37.5%	16
San Diego Union-Tribune	San Diego/Carlsbad/San Marcos MSA	934,400	36.8%	17
Minneapolis Star-Tribune	Minneapolis/St. Paul/Bloomington MSA	834,400	36.5%	18
St. Petersburg Times	Tampa/St. Petersburg/Clearwater MSA	713,100	35.7%	19
Dallas Morning News	Dallas MD	944,800	34.5%	20
<i>Other Florida or Tribune Newspapers</i>				
Baltimore Sun	Baltimore MSA	672,300	33.6%	22
Miami Herald	Miami/Miami Beach/Kendall MD	523,200	28.9%	29
Chicago Tribune	Chicago/Naperville/Joliet MD	1,465,900	25.3%	30
Los Angeles Times	Los Angeles/Long Beach/Glendale MD	1,769,100	24.5%	32



Average DAILY issue adult readership of metropolitan newspapers greater than 500,000 (ranked by coverage %) Source: The 2004 Scarborough Reports, Release 2

One Sunday ad in the Orlando Sentinel reaches more people than a radio ad airing in every available time slot during the week 6 AM - 12 MID on any of the top four stations.

Total Adults	Average Sunday Sentinel	WMGF 6A-12M Su-Sa Cume	WWKA 6A-12M Su-Sa Cume	WXXL 6A-12M Su-Sa Cume	WDBO 6A-12M Su-Sa Cume
1,427,900	59%	18%	14%	13%	13%

Orlando Sentinel vs. Television and Radio

One Sunday ad in the Orlando Sentinel reaches more people than a television ad airing in every available time slot during network primetime, every day of the week, on any of the local network stations.

Total Adults	Average Sunday Sentinel	CBS (WKMG) Primetime 7-Day Cume	ABC (WFTV) Primetime 7-Day Cume	NBC (WESH) Primetime 7-Day Cume	FOX (WOFL) Primetime 7-Day Cume
1,427,900	59%	45%	38%	36%	29%

Source: The 2005 Scarborough Report, Release 2

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Orlando Sentinel Sunday Market Coverage

The Orlando Sentinel ranks 16th for metro market coverage among newspapers with Sunday adult readership over 500,000.



Newspaper	Market	Adult Daily Readership	Percent Coverage	Rank
Buffalo News	Buffalo/Niagra Falls MSA	659,300	74.3%	1
Milwaukee Journal Sentinel	Milwaukee/Waukesha/West Allis MSA	808,300	71.7%	2
New Orleans Times-Picayune	New Orleans/Metairie/Kenner MSA	698,200	71.5%	3
Rochester Democrat & Chronicle	Rochester MSA	545,900	69.3%	4
Louisville Courier-Journal	Louisville MSA	600,200	66.6%	5
Hartford Courant	Hartford/West Hartford/East Hartford MSA	591,000	65.8%	6
San Antonio Express-News	San Antonio MSA	856,000	64.7%	7
Cleveland Plain Dealer	Cleveland/Elyria/Mentor	1,038,200	64.3%	8
Indianapolis Star	Indianapolis MSA	755,400	64.2%	9
Newsday	Suffolk County/Nassau County MD	1,333,200	63.2%	10
Denver Post & Rocky Mountain News	Denver/Aurora MSA	1,073,800	62.0%	11
Memphis Commercial Appeal	Memphis MSA	554,500	61.6%	12
Washington Post	Washington, DC/Arlington/Alexandria MSA	2,311,000	60.3%	13
Columbus Dispatch	Columbus (OH) MSA	756,300	60.0%	14
Oklahoman	Oklahoma City MSA	506,400	59.7%	15
Orlando Sentinel	Orlando MSA	810,300	58.2%	16
Portland Oregonian	Portland/Vancouver/Beaverton MSA	862,000	56.2%	17
Kansas City Star	Kansas City MSA	779,700	55.8%	18
Newark Star-Ledger	Newark/Union MD	886,100	55.0%	19
San Jose Mercury News	San Jose/Sunnyvale/Santa Clara MSA	737,700	54.8%	20
<i>Other Florida or Tribune Newspapers</i>				
Sun-Sentinel	Ft. Laud./Pompano Bch/Deerfield Bch MD	709,500	53.4%	23
Baltimore Sun	Baltimore MSA	1,038,300	51.8%	26
St. Petersburg Times	Tampa/St. Petersburg/Clearwater MSA	891,800	44.6%	42
Miami Herald	Miami/Miami Beach/Kendall MD	739,000	40.8%	47
Chicago Tribune	Chicago/Naperville/Joliet MD	2,324,800	40.2%	48
Los Angeles Times	Los Angeles/Long Beach/Glendale MD	2,528,700	35.0%	49
Tampa Tribune	Tampa/St. Petersburg/Clearwater MSA	687,900	34.4%	50

Average SUNDAY issue adult readership of metropolitan newspapers greater than 500,000 (ranked by coverage %)
Source: The 2004 Scarborough Reports, Release 2

perfect fit

- ✿ NEW Innovative Advertising Opportunities designed to give your advertising more impact and bring greater results.
- ✿ Diversify your marketing program with news and information that speaks to Orlando Hispanics about their local community and countries of origin every Saturday in El Sentinel.
- ✿ Reach non-subscribers and saturate your market with Sentinel Express, a mini-sample of the Orlando Sentinel that includes local news, weekly columns, a police log and community events.
- ✿ Your best prospects are home delivered with Sentinel Direct, offering everything from database marketing to full-service direct mail.
- ✿ OrlandoSentinel.com has reached more Metro Orlando Internet users in the past 30 days than Amazon.com, CNN.com, ESPN.com or Ask Jeeves.

Base: 972,900 Metro Orlando adults who accessed the Internet during the past 30 days
Source: The 2005 Scarborough Report, Release 1



AD-magination Runs Wild with New Shapes



- ✿ **Cut the Clutter:** Receive page advertising exclusivity.
- ✿ **Demand Attention:** Center your ad in the heart of powerful editorial copy.
- ✿ **Stand Out:** Create an unusual ad size for maximum impact.
- ✿ **Availability:** Daily and Sunday in all full run and zone sections. Position within section can be requested, but cannot be guaranteed.
- ✿ **Size and Special Requirements:**
 - Ad size must be anchored against bottom of page.
 - Ad height may not exceed 18" unless the ad extends the full 21" height of the page. See your Multimedia Consultant for specific ad requirements.
- ✿ **Investments and Premiums:**
 - Minimum ad size is half page.
 - 25% Premium.
 - Spot and full color additional and based on availability.

Reach Non-Subscribers



- ✿ **Columns & Features:** A mini-sample of the Orlando Sentinel including local news pertinent to each zone, a weekly column by a Sentinel columnist, a police log and community events.
- ✿ **Distribution:** Thursday; 420,000 non-subscribing households via direct mail.
- Zones include East Orange, West Orange, Seminole, Osceola, Lake and the Volusia Forum. Seven different ad sizes are available in each zone.
- ✿ **Advertising Opportunities:** Display or Insert Zoning capabilities.

For additional information, go to: OrlandoSentinel.com/advertise

Diversify Your Marketing Program



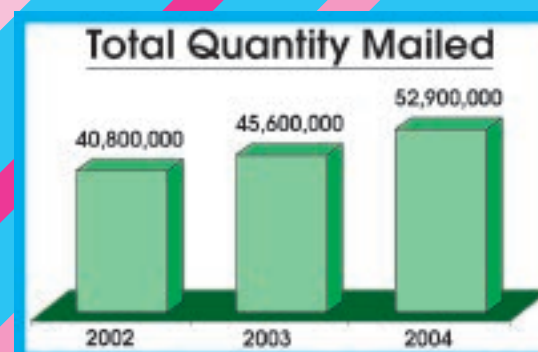
- ✿ **Columns & Features:** News and information that speaks to Orlando Hispanics about their local community and countries of origin.
- ✿ **Hispanic Market:** Nearly 1 in every 5 metro Orlando adults is Hispanic. Orlando's Hispanic market ranks 4th in per capita buying power.
- ✿ **Partnerships:** El Sentinel has partnered with local Spanish radio and TV stations to strengthen its presence in the community.
- ✿ **Distribution:** Saturdays – 71,400 copies delivered to Hispanic homes and free racks throughout Central Florida.

Source: The 2000 U.S. Census
For additional information, go to: OrlandoSentinel.com/advertise

Your Best Prospects Home Delivered



- ✿ **Overview:** Sentinel Direct is an award-winning direct marketing company owned by Orlando Sentinel Communications offering everything from database marketing to full-service direct mail.
- ✿ **Usage:** 807,100 Metro Orlando adults bought an item in the past 12 months as a result of mail advertising (57% of total Metro Orlando adults).



- ✿ **Services:** Database Development
Creative Design
List Selection
Data Processing
Letter Shop Services
Data Overlays
Data Warehouse/Hygiene
E-mail Marketing
Customer Profiling (Prizmne) including mapping and lifestyle segmentation

Source: The 2005 Scarborough Report, Release 1
For additional information, go to: OrlandoSentinel.com/advertise

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Great at Reaching:

- 18 - 54 year old market
- Affluent households of \$75,000+
- Highly educated, white collar professionals
- Households with children
- Tech savvy adults

Metro Market Area

San Jose/Sunnyvale/ Santa Clara MSA
San Francisco/Oakland/ Fremont MSA
Boston/Cambridge/ Quincy MSA
Washington, D.C./ Arlington/Alexandria MSA
Austin/Round Rock MSA
Orlando MSA
Seattle/Tacoma/ Bellevue MSA
Atlanta/Sandy Springs/ Marietta MSA
Sacramento/Arden/ Arcade/Roseville MSA
Baltimore/Towson MSA
MARKETS 11-40
TOTAL-TOP 40 METROS

*Top-40 metro rankings are based on Scarborough universes. Source: The 2004 Scarborough Multi-Market Report, Release 2

Metro Market Area

San Jose/Sunnyvale/ Santa Clara MSA
Austin/Round Rock MSA
San Francisco/Oakland/ Fremont MSA
Boston/Cambridge/ Quincy MSA
San Diego/Carlsbad/ San Marcos MSA
Orlando MSA
Columbus MSA
Seattle/Tacoma/ Bellevue MSA
Kansas City MSA
Washington, D.C./ Arlington/Alexandria MSA
MARKETS 11-40
TOTAL-TOP 40 METROS

*Top-40 metro rankings are based on Scarborough universes. Source: The 2004 Scarborough Multi-Market Report, Release 2

Target Rank	Pop. Rank*	Target Pop.	% of Pop.	Index
1	29	204,100	15.2%	176
2	11	436,600	13.0%	151
3	10	428,600	12.4%	144
4	7	462,100	12.1%	140
5	38	120,700	10.8%	125
6	28	149,800	10.8%	125
7	15	258,400	10.6%	123
8	9	319,200	9.2%	107
9	26	131,600	9.1%	106
10	19	182,900	9.1%	106
		6,697,300	7.9%	91
		9,391,300	8.6%	100

20+ Hours spent on the Internet in an average week.

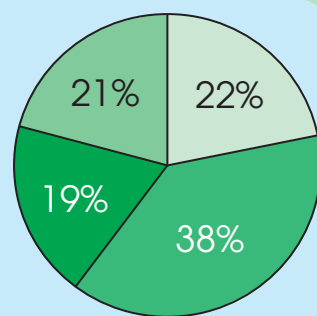
Top Broadband Cities

Target Rank	Pop. Rank*	Target Pop.	% of Pop.	Index
1	29	551,600	41.0%	143
2	38	416,500	39.0%	136
3	11	1,292,600	38.6%	135
4	10	1,319,000	38.3%	134
5	17	808,900	36.2%	126
6	28	480,000	34.5%	120
7	31	432,500	34.3%	120
8	15	815,000	33.6%	117
9	27	449,500	32.2%	112
10	7	1,176,300	30.7%	107
		23,411,500	26.9%	94
		31,153,400	28.6%	100

Metro Orlando ranks as the 6th highest market for broadband penetration



Amount Spent Online



- \$500-\$999
- \$100-\$499
- Less than \$100
- \$1,000 or more

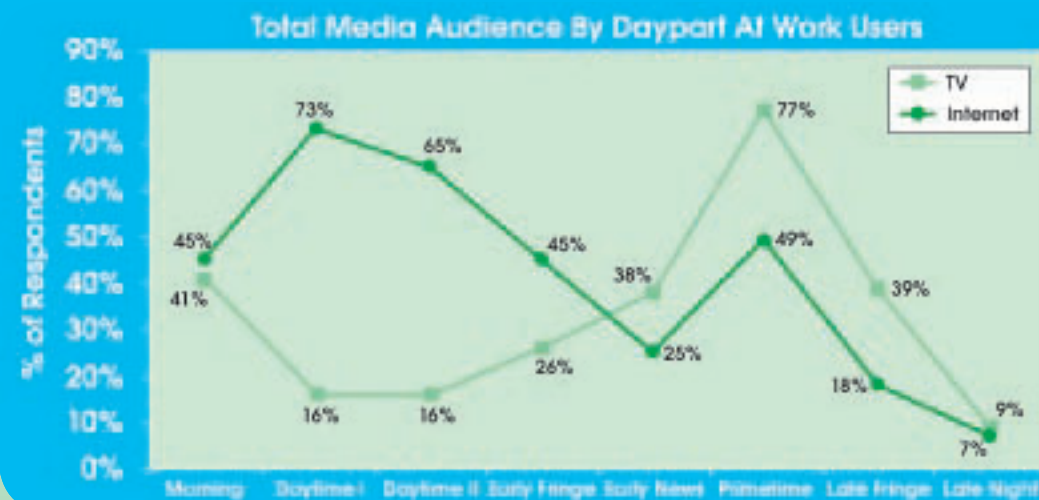
- ✿ Average Monthly Page Views: 17,440,893
- ✿ Average Monthly Unique Visitors: 912,560
- ✿ Average Monthly Page Views per Visitor: 18.85
- ✿ 31% of Orlando area adults visited OrlandoSentinel.com in the past 30 days

Nearly 4 in 10 Metro Orlando Adults spent between \$100 and \$500 in online purchases in the past 12 months.

68% of Internet users in Orlando have made a purchase online in the past 12 months.

Base: 696,400 Metro Orlando adults who made a purchase online during the past 12 months.
Source: The 2004-2005 Combined Scarborough Report, Release 1

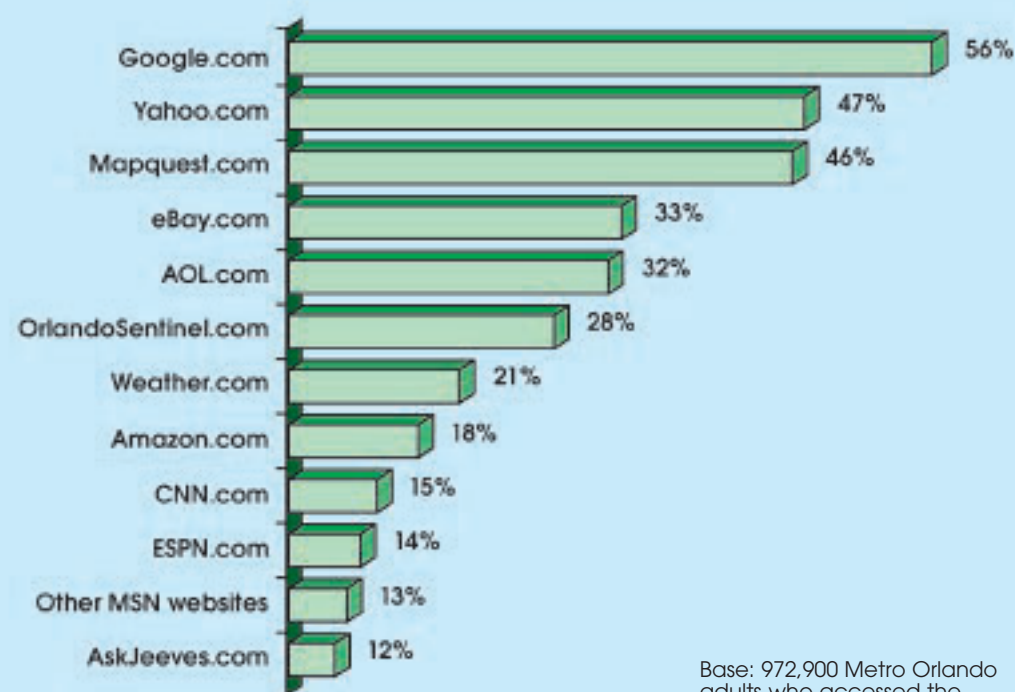
Daytime on the Internet is prime time for "At Work Users"; over 7 in 10 adults access the Internet during their time at the workplace.



Base: 1053 U.S. adults who access the Internet at work.
Source: Online Publishers Association / MBIQ Media Consumption Study, May 2003

Online Sites Visited

More Metro Orlando Internet users have accessed OrlandoSentinel.com in the past 30 days than Amazon.com, CNN.com, ESPN.com, or Ask Jeeves.



Base: 972,900 Metro Orlando adults who accessed the Internet during the past 30 days.
Source: The 2005 Scarborough Report, Release 1

Personal Style

❁ Extending Your Reach

Diversifying products and outlets will enable you to grow market share.

❁ Recommendations

ROP/A-2 – “Prime real estate positioning” located on page 2 of Main News.

Innovative Ads – Take your advertising to the next level with our new unique shaped ads.

OrlandoSentinel.com – OrlandoSentinel.com reaches the female audience both working and non-working with a median household income over \$62,000. The addition of a one week online component to your current ROP schedule extends market reach by 20% daily and 16% Sunday. That is over 75,000 potential customers that have not seen your message!

El Sentinel – A weekly publication delivered on Saturday to over 60,000 Hispanic adults for free.

Sentinel Express (TMC) – Our local TMC product is mailed to non-subscribers on Thursday each week.

Sentinel Direct – An award-winning direct marketing company that offers everything from database marketing to full-service direct mail.

Hello Friends,

We hope this edition of Chic Orlando finds your business prospering. We are very excited to share our ever-changing style market with you. In the next five years, metro Orlando is projected to grow by more in population than any other Florida metro market. Orlando gains an average of 1,600 new adult residents a week and is the 2nd fastest retail growth market in the country contributing to a more competitive retail environment for your business. Numerous new retailers have entered the market over the past few years defining Orlando as a lucrative retail environment.

Let our new innovative ads help you stand out among competitors. It doesn't get any better than this! These ads are designed specifically to give you page exclusivity and more impact by placing your ad in the heart of editorial copy. Consider our growing Hispanic publication, El Sentinel, to reach the fastest growing segment of Orlando's population. At 20% of our total population, the Hispanic market has a powerful buying power making us 5th in the nation for per capita spending. Let OrlandoSentinel.com extend your reach in the market by 20%. This is over 75,000 potential customers that have not seen your message!

Only Orlando Sentinel Communications can customize an exclusive style campaign to insure a perfect fit for your business. Our team of consultants are here to assist you in taking your advertising to the next level. Trust that we have your best interests in mind and can help customize an exclusive campaign just for you. We at Chic Orlando thank you for taking the time to embrace Orlando Sentinel Communications and we look forward to your partnership.

Sincerely,



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